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ServiceNow Certified Implementation Specialist - Customer Service Management Exam

ServiceNow CIS-CSM

Version Demo

Total Demo Questions: 32

Total Premium Questions: 320

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Topic Break Down

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QUESTION NO: 1

What is the primary purpose of a customer service case template?

A. To create cases with predefined values for a repeatable service scenario

B. To automatically close every resolved case

C. To define the access controls for a customer portal

D. To create a new customer account from a case

ANSWER: A

Explanation:

To create cases with predefined values for a repeatable service scenario is correct. Case templates help standardize how common customer issues are recorded and handled. An agent can apply a template when creating a case so that relevant information, such as descriptions, categories, assignment details, or other configured values, is populated consistently.

Using templates reduces repetitive data entry and helps ensure that agents begin common case types with the appropriate information. Templates can also support a more consistent service process across agents and teams. See ServiceNow Customer Service Management and the ServiceNow product documentation portal.

QUESTION NO: 2

Which of the following are best practice with regard to data imports? (Choose two.)

A. When importing to multiple instances import to each instance separately.

B. legacy repository.

C. not automatically adjust the length.

D. Images embedded in Knowledge Articles should be uploaded separately

ANSWER: A D

Explanation:

When importing to multiple instances import to each instance separately is a best practice because every ServiceNow instance has its own configuration, existing records, sys_ids, reference data, and potentially different transform-map requirements. Running and validating an import independently in each target instance provides control over field mapping, coalescing behavior, error handling, and reconciliation. It also prevents assumptions made in one environment from causing unintended record updates or duplicates in another environment. ServiceNow import sets are designed to stage external data and then transform it into target tables using instance-specific import-set tables and transform maps. See the ServiceNow Import Sets documentation for the staging and transformation model.

Images embedded in Knowledge Articles should be uploaded separately is also a best practice for knowledge migration. Article-body imports primarily move textual content and metadata; embedded images are files that must be available as attachments or managed image records in the destination instance. Uploading images separately ensures that the destination has the required image assets and that article HTML can reference the correct files after migration. This supports reliable rendering and allows image links to be validated as part of post-import quality checks. ServiceNow describes article import and knowledge-management administration in its Knowledge Management documentation.

QUESTION NO: 3

Which CSM Configurable Workspace feature enables agents to quickly view records in the contextual side panel without switching tabs?

A. Contextual Search

B. Agent Assist

C. Dynamic Related Records

D. Record Information

ANSWER: C

Explanation:

Dynamic Related Records is the CSM Configurable Workspace capability designed to surface records related to the agent's current work item in the contextual side panel. It lets an agent inspect relevant associated information—such as linked cases, accounts, contacts, assets, or other configured record relationships—while retaining the current record as the primary focus. This supports a faster case-handling workflow because the agent can review relationship-driven context without leaving the active workspace record or opening and navigating among separate tabs. The feature is dynamic because the records presented can be determined by the current record and the relationship configuration, so agents receive context appropriate to the case they are handling. Administrators configure the workspace experience and its contextual information to make related data readily available where agents need it. ServiceNow's Customer Service Management documentation describes Configurable Workspace as the agent experience for managing customer service work, while its product documentation provides the broader configuration context for workspace capabilities and related record information. See the ServiceNow CSM Configurable Workspace documentation and the Customer Service Management documentation.

QUESTION NO: 4

In Advanced Work Assignment, what does the overflow assignment capability do, if defined?

A. Uses matching and assignment rules to send work items to the agent with the most capacity

B. When one support group reaches capacity, the work item is automatically routed to another group

C. Uses matching and assignment rules to send work items to the agent with the highest availability

D. Routes cases to different groups based on their skill set and availability

ANSWER: B

Explanation:

When one support group reaches capacity, the work item is automatically routed to another group. In Advanced Work Assignment, overflow assignment provides a controlled fallback path for work that cannot be assigned by its primary assignment group because that group has reached its configured capacity. Administrators define an overflow group relationship so eligible work can continue moving through the assignment process instead of remaining unassigned or waiting solely for capacity to become available in the original group. This supports service continuity during high-volume periods, uneven demand, staffing constraints, or temporary surges affecting a particular support team.

The capability operates at the group level: once the primary group is unable to take additional work under its capacity settings, Advanced Work Assignment can direct the work to the designated overflow group. The receiving group can then use its own available agents and assignment configuration to handle the item. This arrangement helps organizations maintain timely customer service while preserving deliberate routing design and operational ownership. ServiceNow documents Advanced Work Assignment as the framework for capacity-aware work distribution in Customer Service Management; see the Advanced Work Assignment documentation and the overflow assignment configuration documentation.

QUESTION NO: 5

Users with the sn_customerservice.proxy_contact role can do which of the following? (Choose two.)

A. Manage cases on behalf of customer service agents

B. Create cases on behalf of customers

C. Manage requests on behalf of customer service agents

D. Create requests on behalf of customers

E. Manage major incident communication on behalf of a customer service manager

ANSWER: B D

Explanation:

The `sn_customerservice.proxy_contact` role supports a proxy-contact workflow in Customer Service Management. A proxy contact is permitted to represent a customer when interacting with the organization, allowing service interactions to be submitted without requiring the represented customer to perform the submission personally. Therefore, **Create cases on behalf of customers** is correct: the proxy contact can open a CSM case while identifying the customer for whom the issue or inquiry is being raised. The case retains the customer context needed for agent work, entitlement evaluation, communications, and resolution.

Create requests on behalf of customers is also correct. The same proxy capability extends to customer requests, enabling an authorized proxy to submit a request for the customer and preserve the relationship between the request and the represented customer. This is useful when a customer relies on an assistant, partner, account representative, or another designated person to initiate service interactions. ServiceNow documents this capability as allowing authorized users to create cases and requests for customers through the proxy-contact role. See the ServiceNow documentation on creating a case or request on behalf of a customer and the Customer Service Management product overview.

QUESTION NO: 6

What are benefits of me Conversation History feature? (Choose two.)

A. Shorter calls for agents by reducing the time to search for information

B. A customized admin chat toolbar with emojis for agents to use in chat messages

C. Improved customer satisfaction as agents can respond to and resolve customer issues faster

D. Better language management by flagging key words and alerting chat managers when agents use one or more of those words

ANSWER: A C

Explanation:

Conversation History gives customer service agents a consolidated view of prior customer interactions and their context. By making earlier conversations readily available within the agent experience, it reduces the need to manually search across records or ask customers to repeat details they have already provided. This supports shorter calls for agents by reducing the time to search for information, while allowing agents to focus on diagnosis and next steps rather than information gathering.

Having this history also enables agents to respond with a fuller understanding of the customer's previous contacts, outstanding concerns, and prior guidance. That continuity makes handoffs less disruptive and helps agents provide relevant assistance more quickly. As a result, improved customer satisfaction as agents can respond to and resolve customer issues faster is a direct business benefit: customers receive more informed service and spend less time restating their issue. Conversation History aligns with Customer Service Management's goal of giving agents the contextual information needed to deliver efficient, connected service across customer engagements.

For CSM product documentation and related agent-workspace capabilities, see ServiceNow Customer Service Management documentation and ServiceNow Customer Service Management product overview.

QUESTION NO: 7

An account is a supported external customer and a contact is a user who is an employee of an account. How many accounts can a contact be associated with?

A. One

B. Two

C. Three

D. Multiple

ANSWER: A

Explanation:

One is correct. In Customer Service Management, an account represents an external customer organization, while a contact represents an individual external user associated with that organization. The standard contact record contains a single Account reference, establishing a one-to-many relationship: one account can have many contacts, but each contact is assigned to one account. This association supplies the organizational context that CSM uses when agents work with customer information and related records, including cases and entitlements. Maintaining one account on the contact also ensures that the contact's customer identity and access context are consistently tied to the organization they represent. ServiceNow's CSM data model documentation describes accounts and contacts as core customer entities, with contacts representing people at customer accounts. Additional details on the CSM application and its customer-data concepts are available in the ServiceNow Customer Service Management documentation and the Customer Administration data model documentation.

QUESTION NO: 8

What role can be assigned to employees who are not fulfillers, such as those in sales and services, or do not have other CSM-specific roles, but have a need to create cases on behalf of customers?

A. Consumer (sn_customerservice.consumer)

B. Customer (sn_customerservice.customer)

C. External (snc_external)

D. Proxy Contact (sn_customerservice.proxy_contact)

ANSWER: D

Explanation:

Proxy Contact (sn_customerservice.proxy_contact) is the appropriate role for internal employees who need to open customer service cases for customers but are not CSM agents, fulfillers, or otherwise assigned broader CSM workspace responsibilities. This role supports the common business scenario in which sales representatives, account teams, or service personnel act as an intermediary for a customer and need to record an issue or request on that customer's behalf. A proxy contact can create cases while representing the customer, enabling the case to be associated with the relevant customer context and preserving an appropriate service record. The role is intentionally tailored to case submission rather than providing the full set of capabilities used by customer service agents to manage, work, and resolve cases. This makes it suitable for employees who need limited CSM access solely to initiate customer requests. ServiceNow's Customer Service Management role documentation describes the available CSM roles and their intended access patterns. See the ServiceNow CSM roles documentation and the ServiceNow Customer Service Management product overview for further context.

QUESTION NO: 9

Which of the following is a condition for matching rules?

A. Agent domain

B. Assignment

C. Switching

D. Specific case attributes

ANSWER: D

Explanation:

Specific case attributes is correct because CSM case-assignment matching rules use conditions to identify the cases to which a rule applies. These conditions are built from attributes on the case record, allowing an implementation to target a particular category of work. For example, a rule can be applicable when a case has a certain product, service, account, priority, entitlement-related value, type, or another configured case-field value. Once a case satisfies those case criteria, the matching process can evaluate the rule and identify a suitable assignment outcome according to the rule's configured matching and assignment behavior.

This case-focused condition design lets organizations route work consistently while keeping the logic aligned with the characteristics of the customer issue itself. Administrators should therefore define matching-rule conditions using the case data that meaningfully distinguishes the population of cases requiring a particular handling path. ServiceNow's CSM documentation describes case-assignment matching rules and their use in matching cases based on configured rule criteria. See the ServiceNow documentation for case assignment matching rules and the current CSM documentation.

QUESTION NO: 10

What should be done if an attribute about an Install Base Item is merely for informational purposes?

A. Include it in the entitlement details

B. Track it as an Install Base characteristic

C. Document it in the product manual

D. Create a Install Base custom field

ANSWER: B

Explanation:

Track it as an Install Base characteristic. In Customer Service Management Install Base Management, characteristics provide a flexible way to store descriptive attributes about an installed product or service without making those attributes part of the core Install Base Item data model. This is appropriate when the value is informational: for example, a customer-specific configuration detail, an observed physical attribute, or another piece of contextual information that agents may need to view while servicing the item. Characteristics can be associated with the relevant Install Base Item and presented to users as part of the item's information, allowing the implementation to capture useful context while avoiding unnecessary schema customization. This approach also supports a more maintainable design because informational attributes can be managed as defined characteristics rather than requiring a separate field for each possible detail. Entitlement information has a different purpose: it supports determining the service coverage available for an item, rather than recording general descriptive data. ServiceNow's Install Base Management documentation describes Install Base Items and the related information used to support customer service processes. See the ServiceNow Install Base Management documentation and the Customer Service Management product documentation.

QUESTION NO: 11

Out-of-box, which functionality handles state transitioning for case management?

A. Workflows

B. State Flows

C. Business Rules

D. Flows

ANSWER: B

Explanation:

State Flows is correct. In Customer Service Management, ServiceNow provides State Flow functionality out of the box to control how a case progresses through its lifecycle. A state flow defines the valid case states and the allowed transitions between them, helping ensure that agents move cases through a consistent, governed process. It can also control the availability of state choices based on the current state, so the user experience reflects the intended case-management process rather than exposing arbitrary transitions.

State flows are designed specifically for state-model management and can be tailored when an organization needs to adjust lifecycle behavior, such as introducing an approval-related progression or aligning case processing with internal service operations. The configuration provides a maintainable way to govern state transitions without putting that lifecycle logic directly into custom scripts. ServiceNow documents State Flow customization as the mechanism used to define and modify state-transition behavior for applicable record types, including CSM case processes. For implementation details, see the ServiceNow documentation on State Flow customization and the Customer Service Management case management documentation.

QUESTION NO: 12 - (HOTSPOT)

HOTSPOT

Match the definitions for roles relationships.

Hot Area:

Answer Area

A customer account, a partner account, or both.

- Partner
- Account
- Contact
- Consumer

A supported external customer that, sells and supports one or more customers.

- Partner
- Account
- Contact
- Consumer

A member of an account.

- Partner
- Account
- Contact
- Consumer

A person who purchases goods and services for personal use.

- Partner
- Account
- Contact
- Consumer

ANSWER:

Explanation:

ServiceNow Customer Service Management uses these relationship types to distinguish business entities, the people associated with those entities, channel organizations, and individual end purchasers. An **Account** represents an organization in the customer or partner ecosystem, so it correctly covers a customer account, a partner account, or an organization that is both. A **Partner** is an external organization supported through the partner model and is able to sell and support one or more customers. This relationship makes it possible to represent a partner's role in delivering products or services to customer organizations.

A **Contact** is the individual person associated with an account. Contacts provide the named people through whom an organization interacts with customer service, including people who can open, track, or participate in service interactions on behalf of their account. A **Consumer** represents an individual who purchases goods and services for personal use, rather than acting as a representative of a business account. These distinctions support accurate customer data, entitlement handling, case visibility, and service interactions. ServiceNow's CSM product information describes the application's support for customer and consumer service experiences: ServiceNow Customer Service Management. ServiceNow's product documentation portal is also the authoritative location for release-specific CSM data-model and configuration guidance: ServiceNow Product Documentation.

QUESTION NO: 13

When working with communication channels, what inbound email flows are available by default? (Choose two.)

A. Create case for product

B. Create case for asset

C. Update case from forward email

D. Create case from email

E. Update case using reply

ANSWER: D E

Explanation:

Create case from email and **Update case using reply** are the standard inbound-email flows supplied for Customer Service Management communication channels. The create flow processes a new customer email and uses its content and sender details to create a Customer Service Management case. This lets customers initiate service requests through an email address without needing to use a portal or agent-assisted channel. The flow can apply the configured case attributes and routing behavior associated with the communication channel, so that the new case enters the appropriate customer-service process.

Update case using reply supports the continuing email conversation after a case exists. When a customer replies to an email associated with that case, the inbound-email processing identifies the related record and adds the response to the case activity rather than treating it as a separate request. Together, these default flows support the essential lifecycle of opening a case by email and maintaining that same case through subsequent replies. ServiceNow's Customer Service Management documentation describes the available CSM configuration and channel capabilities, while the platform documentation provides the underlying inbound-email processing model. See the ServiceNow Customer Service Management documentation and ServiceNow email documentation.

QUESTION NO: 14

Contextual Search framework is used for providing Knowledge search results in which of these scenarios?

A. Entering question in portal only

B. Record Producer only

C. Both portal question entry and Record Producer

D. None of the above

ANSWER: B

Explanation:

Record Producer only is correct. In ServiceNow, Contextual Search is designed to present relevant knowledge content to users while they are completing a record producer in the Service Portal. The framework uses the contextual-search configuration associated with that producer, including the configured searchable fields and search sources, to derive a query from information the user enters. It then displays potentially helpful knowledge articles directly in the submission experience, giving users an opportunity to resolve their issue themselves before they create a record such as a case or incident.

This is particularly useful in Customer Service Management implementations because record producers are commonly used as customer-facing intake forms. The configuration lets an administrator tailor which knowledge bases are searched and which producer field values contribute to the contextual query. As a result, the knowledge suggestions are relevant to the service request being described rather than being merely a general portal search. ServiceNow documents Contextual Search as a Service Portal capability and describes its use with record producers; see the ServiceNow Contextual Search documentation and the configuration guidance for Contextual Search.

QUESTION NO: 15

What are the Forum User Types? (Choose three.)

A. Admin

B. Registered

C. Public

D. Custom

E. Moderator

ANSWER: B C E

Explanation:

ServiceNow Customer Service Management communities use forum user types to determine the level of access a person has when viewing and participating in community discussions. **Public** users represent unauthenticated visitors. They can access forum content that has been made available publicly, supporting self-service and knowledge sharing without requiring a community account. **Registered** users are authenticated community members. Registration provides an identity that enables participation in the forum experience, such as creating posts and interacting with discussions according to the community's configured permissions. **Moderator** users have elevated forum-management responsibilities. This role supports healthy, useful discussions by allowing designated users to oversee and manage forum content and activity in accordance with moderation permissions.

These user types provide a practical access model for communities: open consumption for public visitors, authenticated participation for registered members, and governance for moderators. Community administrators configure the underlying community and permission model, but the forum user-type categories themselves are Public, Registered, and Moderator. See the ServiceNow documentation on Community permissions and the Customer Service Management product overview.

QUESTION NO: 16

From which one of the following can an agent create a CSM Case:

A. Human Resource Application

B. Incident Management

C. Chat

D. Special Handling Note

ANSWER: C

Explanation:

Chat is correct because Customer Service Management agents can create a case while handling a customer chat interaction. This supports a smooth handoff from a real-time conversation to a tracked customer-service record when the customer's issue needs investigation, fulfillment, follow-up, or work by another team. The agent can capture the details already discussed with the customer and use them to create the case, preserving the service context rather than requiring the customer to begin a separate request.

ServiceNow CSM is designed to support customer engagement across channels, including chat. In Agent Workspace or the relevant agent experience, an agent working with a chat can use the available case-creation capability to document the issue as a CSM case and continue managing it through the standard case lifecycle. This enables consistent assignment, communication, task management, and resolution tracking for work that originates in a conversational support channel. ServiceNow's CSM documentation describes agent chat capabilities and the process of managing customer interactions in the agent experience. See the Customer Service Management product documentation and the agent inbox status documentation.

QUESTION NO: 17

In Advanced Work Assignment, what does the overflow assignment capability do, if defined?

A. When one support group reaches capacity the work item is automatically routed to another group

B. Uses matching and assignment rules to send work items to the agent with the highest availability

C. Routes cases to different groups based on their skill set and availability

D. Uses matching and assignment rules to send work items to the agent with the most capacity

ANSWER: A

Explanation:

"When one support group reaches capacity the work item is automatically routed to another group" is correct. In Advanced Work Assignment, an assignment group can have an overflow group configured as part of its assignment eligibility settings. The primary group remains the intended destination for eligible work, but AWA evaluates whether agents in that group can receive the item under the applicable capacity constraints. If the primary group has no available capacity to accept the work, AWA can use the defined overflow group rather than leaving the item unassigned or continuing to target a group that cannot take it.

This capability supports service continuity during demand spikes, staffing shortages, or uneven workloads. The overflow group should be prepared to handle the same type of work, with appropriate agent availability, assignment capacity, and any necessary skills or permissions. Overflow assignment is therefore a group-level fallback mechanism: it extends the pool of groups that can receive a work item once the originally eligible group is at capacity. Administrators define the overflow relationship in the assignment eligibility configuration for the relevant work-item routing setup. ServiceNow's Advanced Work Assignment assignment-eligibility documentation describes configuring the eligible assignment group and its overflow behavior: Specify assignment eligibility for Advanced Work Assignment.

QUESTION NO: 18

Advance Work Assignment assigns work to agents based on their availability, capacity, and skills. Agent Affinity enhances the Advanced Work Assignment process by adding additional agent details organized by affinity type. Which of these are these affinity types? (Choose three.)

A. Skill seniority

B. Account team responsibility

C. Historical

D. Related task

E. Product expertise

ANSWER: B C D

Explanation:

Agent Affinity in Advanced Work Assignment provides additional routing context that can help direct work to the agent with the most relevant relationship to the customer or work item. The affinity types are **Account team responsibility**, **Historical**, and **Related task**. Account team responsibility supports assignment to agents associated with responsibility for the relevant account, helping preserve ownership and account knowledge. Historical affinity considers an agent's prior interactions or work history with the relevant customer, supporting continuity and a more personalized service experience. Related task affinity uses relationships to associated work so that tasks connected to an existing customer issue or process can be routed with appropriate context. These affinity details augment the core availability, capacity, and skill-based assignment decisions made by Advanced Work Assignment. Administrators can configure affinity so routing reflects operational relationships that matter to the service organization, while still using the work-item and agent data needed for effective assignment. ServiceNow documents Agent Affinity as part of its Advanced Work Assignment administration capabilities. See the ServiceNow Agent Affinity documentation and the ServiceNow Customer Service Management product overview.

QUESTION NO: 19

What are the recommended good practices when running implementation workshops?

Choose 3 answers

A. Guide the customer toward industry best practices

B. Enforce customers to adapt their processes towards the baseline processes

C. Give the customers the data they need so they can make an informed decision

D. Any financial implication of a decision should be handled by the delivery and sales team

E. Engage with customers to gain deep understanding of their organization

ANSWER: A C E

Explanation:

Implementation workshops should be collaborative, outcome-focused sessions that help the customer make sound design decisions while maximizing adoption of ServiceNow capabilities. **Guide the customer toward industry best practices** is appropriate because ServiceNow implementations are intended to use proven, out-of-box processes where possible, while still aligning the solution to the customer's service strategy and requirements. **Give the customers the data they need so they can make an informed decision** supports transparent decision-making: facilitators should clearly present relevant process, platform, effort, and impact information so customer stakeholders can evaluate choices and agree on a direction. **Engage with customers to gain deep understanding of their organization** is equally essential. Understanding organizational goals, users, operating model, existing processes, and constraints enables the implementation team to design a practical CSM solution and lead productive discussions. These practices reflect ServiceNow's emphasis on partnership, value realization, and adoption rather than treating workshops as one-way requirements-gathering meetings. Further guidance on implementation planning and adopting ServiceNow capabilities is available in the ServiceNow Now Value resources and the ServiceNow Community implementation best-practices guidance.

QUESTION NO: 20

An entitlement defines the types of support a customer receives. Entitlements are based on a number of standard fields such as product and asset. When Proactive Customer Service Operations is implemented which additional fields could be used?

Choose 2 answers

A. Contact

B. Sold product

C. Install base Item

D. Configuration item

E. Business Service

ANSWER: B C

Explanation:

When Proactive Customer Service Operations is implemented, entitlement matching can use both **Sold product** and **Install base Item** as additional qualification fields. A sold product represents the product that was purchased by a customer or account, enabling the organization to associate support coverage with the commercial product relationship. This is useful when eligibility depends on what the customer bought, including the support terms attached to that sale.

An install base item represents a specific deployed or installed instance of a sold product. Using an install base item in an entitlement provides more precise coverage determination because support can be associated with the individual item in use by the customer. This supports proactive service workflows in which service activity, alerts, or issues can be evaluated against the covered product instance and its applicable support agreement. Together, these fields extend entitlement evaluation from general product or asset-based coverage to customer purchase and installed-product context, helping ensure that proactive support is applied to the appropriate covered item. See the ServiceNow Proactive Customer Service Operations documentation and the CSM entitlements documentation.

QUESTION NO: 21

Asset classes are defined to allow for logical grouping of assets. There are five asset classes provided to group assets, each Asset class provides unique functionality for that group of Assets in the platform. Which of the following are the asset classes used? (Choose five.)

A. Hardware assets Most Voted

B. Facility assets Most Voted

C. Configuration assets

D. Software licenses assets Most Voted

E. Enterprise Software assets Most Voted

F. Network assets

G. Consumables assets

ANSWER: A B D E G

Explanation:

ServiceNow Asset Management uses asset classes to organize records according to the operational processes and data that apply to each kind of asset. The five provided classes are hardware assets, facility assets, software licenses assets, enterprise software assets, and consumables assets. Hardware assets support lifecycle processes for physical technology equipment, while facility assets represent assets associated with physical locations and facilities. Software licenses assets support license and entitlement-oriented management, and enterprise software assets represent software products managed at an enterprise level. Consumables assets are intended for items that are used up or distributed and therefore require inventory-oriented handling rather than the lifecycle treatment used for durable equipment. These classes correspond to the platform's standard asset data model and enable the appropriate asset-specific fields, workflows, and management capabilities. ServiceNow documents Asset Management as the application used to manage assets throughout their lifecycle and distinguishes asset types according to the processes needed to manage them. See the ServiceNow Asset Management documentation and the ServiceNow IT Asset Management product overview.

QUESTION NO: 22

During which Now Create stage are workshops conducted?

A. Execute

B. Initiate

C. Deliver

D. Plan

E. Close

ANSWER: D

Explanation:

Workshops are conducted during the **Plan** stage of the Now Create implementation methodology. This stage establishes the detailed foundation for delivery by bringing the customer's business stakeholders and implementation team together to clarify requirements, align on desired outcomes, define processes, and make the key design decisions needed for the implementation. Workshops provide a structured setting to translate the initial vision and scope into an actionable plan, including prioritized requirements, roles, milestones, dependencies, and an agreed approach for configuring the ServiceNow solution.

Planning workshops are particularly important in Customer Service Management implementations because they help teams map customer-service processes, identify the personas and journeys that the solution must support, and determine how case management and related capabilities should operate. The outputs from these sessions guide the work that follows and help ensure stakeholders share an understanding of what will be delivered. ServiceNow describes Now Create as its prescriptive customer-success framework and provides implementation guidance and reusable assets through its Now Create resources. See the Now Create eBook and the ServiceNow Now Create portal.

QUESTION NO: 23

Which capabilities does the integration with Microsoft Outlook add-in offer? (Choose two.)

A. Escalate a case on the add-in panel of Outlook

B. Register the sender of an email as contact

C. As the Microsoft Outlook user, register yourself as self-contributor

D. Create cases using email content in Outlook for the customer contact

ANSWER: B D

Explanation:

The Microsoft Outlook add-in for Customer Service Management helps agents act on customer email directly from Outlook while retaining the customer-service context in ServiceNow. “Register the sender of an email as contact” is a supported capability because the add-in can use the sender details from an email to create or associate a customer contact record. This reduces the need to manually re-enter known email information and helps ensure that subsequent service interactions are associated with the appropriate customer contact.

“Create cases using email content in Outlook for the customer contact” is also supported. From the Outlook add-in, an agent can create a Customer Service Management case from an email and use the message content as the basis for the case. The resulting case is associated with the relevant contact, enabling agents to begin tracking, assigning, and resolving the request in the standard ServiceNow case-management workflow. These capabilities are intended to streamline email-to-case work for support teams without requiring agents to leave their email client for routine case creation and contact registration. See the ServiceNow Customer Service Management Outlook add-in documentation and the Customer Service Management product documentation.

QUESTION NO: 24

What are some of the influencing factors that will help determine the type of customer support desk structure required? (Choose four.)

A. Knowledge and skills required for agents

B. Geographical location of customer

C. Languages spoken by agents

D. Number and type of support tools available

E. Number of customer service portals used

F. Number of agents required

ANSWER: A C D F

Explanation:

“Knowledge and skills required for agents,” “Languages spoken by agents,” “Number and type of support tools available,” and “Number of agents required” are the key planning inputs for defining an effective customer support desk structure. The skill and knowledge profile needed to resolve customer issues helps determine whether teams should be broadly skilled, specialized by product or issue type, or organized into escalation tiers. Language capabilities influence how work can be routed and whether dedicated language-based coverage is needed. The available support-tool landscape also affects the operating model because agents need appropriate case-management, knowledge, communication, and integration capabilities to work efficiently within the chosen structure. Finally, the required agent population is central to capacity planning and determines whether a single team, multiple teams, or a tiered organization is practical. In ServiceNow Customer Service Management, these organizational choices should align with the processes and tooling used to manage cases, knowledge, interactions, and service delivery. See the ServiceNow Customer Service Management product overview and the Customer Service Management documentation for CSM capabilities that support these operational models.

QUESTION NO: 25

Advanced Work Assignment (AWA) automatically routes and assigns work items to agents based on which of the following rules? (Choose four.)

A. Experience

B. Skills

C. Availability

D. Shifts

E. Capacity

F. Products

ANSWER: B C D E

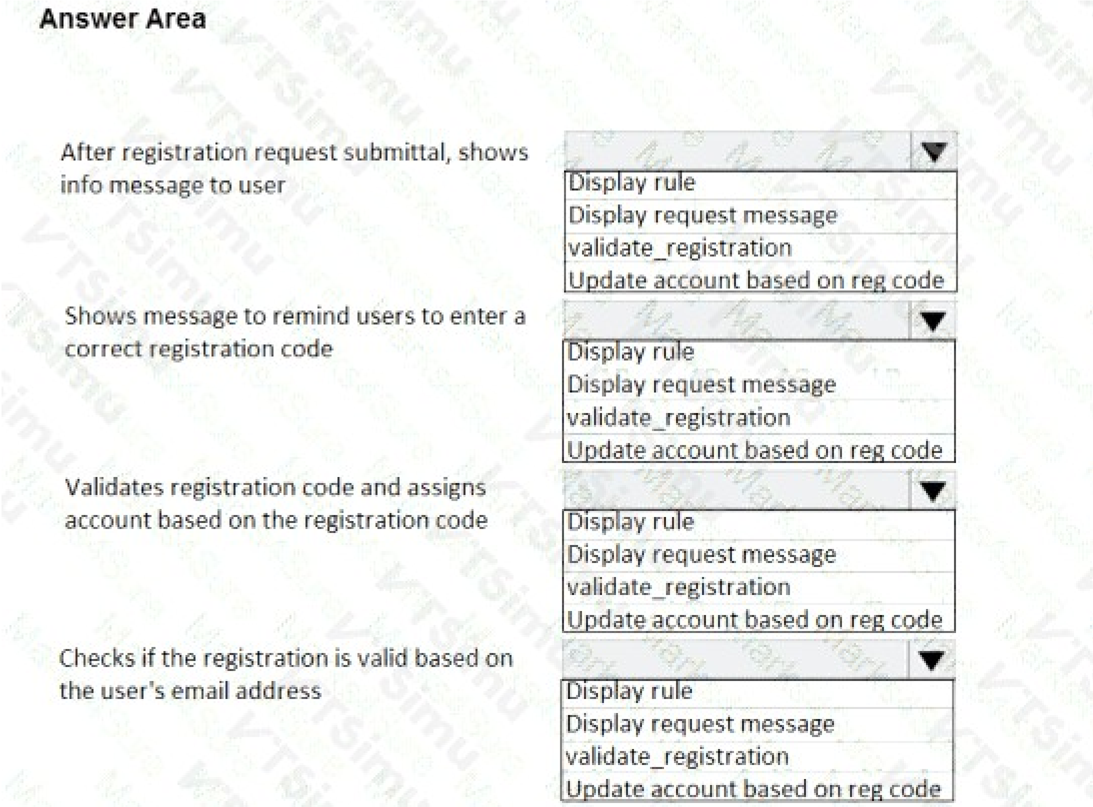
Explanation:

Advanced Work Assignment uses routing logic to identify an eligible agent and then distribute work intelligently. **Skills** are evaluated through the skills associated with a work item and the skills assigned to agents, helping ensure that work is directed to agents who are qualified to handle it. **Availability** determines whether an agent is currently able to receive work, rather than merely being a member of a relevant assignment group. **Shifts** provide schedule-based eligibility, so routing can account for the agent’s configured working hours and shift coverage. **Capacity** controls the amount of work an agent can accept, including consideration of their current assigned workload and the capacity definitions used for the work item’s channel or service. Together, these criteria support balanced distribution while matching customer work with appropriately qualified, scheduled, and available agents. AWA routing configurations can also use assignment rules and conditions to define the work population and eligible agent pool, while these four agent attributes are core factors in selecting the appropriate recipient. See the ServiceNow Advanced Work Assignment product overview and the ServiceNow product documentation for AWA configuration and routing details.

QUESTION NO: 26 - (SIMULATION)

Match the business rule to its function in the Self-Service Portal.

Hot Area:



ANSWER: See the explanation for the answer

Explanation:

Match the business rules as follows:

After registration request submittal, shows info message to user → `Display request message`
Shows message to remind users to enter a correct registration code → `Display rule`
Validates registration code and assigns account based on the registration code → `Update account based on reg code`
Checks if registration is valid based on the user's email address → `validate_registration`

QUESTION NO: 27

Which of the following functions can be completed when using the Field Service Management Application on a mobile device offline? (Choose three.)

A. Manage requests

B. Execute assigned tasks

C. Close work orders

D. Manage cases

E. Manage assets

ANSWER: B C E

Explanation:

Field Service Management mobile supports core technician work even when a device temporarily has no network connection. **Execute assigned tasks** is supported because technicians can access downloaded assignment information at the work location, perform required task activities, and record completion-related updates while offline. **Close work orders** is also supported, allowing field workers to complete the work-order lifecycle after the necessary work and task information has been recorded on the device. **Manage assets** is available offline so technicians can work with asset information needed during onsite service, such as identifying or updating assets associated with the work being performed.

Offline changes are retained in the mobile device cache. When connectivity is restored, the Field Service Management mobile application synchronizes those locally stored updates with the ServiceNow instance. This offline capability is intended to keep technicians productive in locations with unreliable or unavailable connectivity while preserving the work details captured in the field. ServiceNow documents the supported offline mobile experience and synchronization behavior in its Field Service Management documentation: Field Service Management mobile experience. For current product documentation and release-specific guidance, see the ServiceNow Field Service Management documentation.

QUESTION NO: 28

Proactive Customer Service Operations works Event Management to proactively monitor and fix issues affecting customers. It can also trigger case workflow's and enable organizations to notify customers whose services or products are impacted by an outage or issue. What are the three main components that make up Proactive Customer Service Operations? (Choose three.)

A. Proactive Prevention

B. Service-Aware Install Base

C. Service Reporting

D. Proactive Case

E. Service-Aware CMDB

F. Service Monitoring

ANSWER: B D F

Explanation:

Proactive Customer Service Operations combines operational visibility, customer and service context, and automated customer-service action. **Service Monitoring** supplies the operational signal by using ServiceNow Event Management to identify service issues and outages that may affect customers. This enables support teams to act from detected conditions rather than waiting for customers to report a problem.

Service-Aware Install Base provides the relationship information needed to understand which customer accounts, installed products, assets, and subscribed services are associated with an affected service. That context is essential for accurately determining the customers potentially impacted by an event and for targeting communications or support activity appropriately.

Proactive Case turns the monitoring insight and impact analysis into customer-service work. It can create and manage cases proactively, allowing agents and workflows to communicate with affected customers, coordinate resolution activity, and track the customer-facing consequences of an outage. Together, these capabilities connect IT operations with Customer Service Management so organizations can identify impact and engage customers before or while they contact support. See ServiceNow's Customer Service Management product information and the Orlando Customer Service Management release notes.

QUESTION NO: 29

Which combination of roles is restricted for security purposes?

A. snc_internal and sn_customerservice.partner_admin

B. snc_internal and sn_customerservice.consumer_agent

C. snc_external and sn_customerservice customer

D. snc_internal and sn_customerservice__agent

ANSWER: A

Explanation:

snc_internal and sn_customerservice.partner_admin is the restricted combination. The `snc_internal` role identifies a user as an internal user, while `sn_customerservice.partner_admin` is intended for an external partner administrator who manages partner users and associated customer-service access. ServiceNow enforces a role restriction between these roles to preserve the separation of internal employee access and external partner administration. This boundary is important because partner-administration capabilities are designed around an external-user security context, whereas internal users can be granted access through the platform's internal roles and CSM agent or manager roles as appropriate. Preventing the two roles from being held together helps ensure that partner account administration does not operate with an internal identity context and supports least-privilege access design. When configuring CSM users, assign roles according to whether the person is an internal agent, a customer contact, or a partner user, and use the applicable partner roles only for the intended external partner population. ServiceNow's CSM role documentation describes the roles used for customer, consumer, partner, and agent access: Customer Service Management roles. General access-control and role-assignment guidance is available in the ServiceNow security documentation.

QUESTION NO: 30

The self-registration feature enables new customer contacts to submit registration requests from the customer portal. Which role is responsible for creating the unique registration code for each account?

A. Customer Service Manager (sn_customerservice_manager)

B. System administrator (admin)

C. Service organization administrator (sn_customerservice.service_organization_admin)

D. Customer admin (sn_customerservice.customer_admin)

ANSWER: C

Explanation:

The **Service organization administrator (sn_customerservice.service_organization_admin)** role is responsible for creating the unique registration code associated with a customer account. In Customer Service Management self-registration, a prospective customer contact enters this account-specific code when submitting a registration request through the customer portal. The code provides the controlled association between the requestor and the appropriate customer account, allowing the service organization to validate and process the contact's access request in the intended account context.

This responsibility belongs to the service organization administration function because it manages the service provider's customer-account onboarding and registration configuration. After a code is created for an account, it can be communicated to eligible contacts so they can use the self-registration workflow. The resulting request is then handled according to the organization's configured approval and contact-management processes. ServiceNow's Customer Service Management documentation describes self-registration and the registration-code process as part of managing customer access to CSM portals. See the ServiceNow Customer self-registration documentation and the ServiceNow registration-code creation documentation.

QUESTION NO: 31

How can multiple service catalogs be made available on the Customer Service Portal?

A. Include them in the list of service catalogs on the Customer Service Portal record

B. Add them to the list of service catalogs in the Customer Service Portal header widget options

C. Only the Customer Service service catalog can be used on the Customer Service Portal

D. Create user criteria for each of the applicable service catalogs

ANSWER: A

Explanation:

Include them in the list of service catalogs on the Customer Service Portal record is correct because the portal configuration determines which catalogs are exposed to portal users. The Customer Service Portal record provides a catalog association/list setting where an administrator can select the service catalogs that should be available through that portal. Adding the applicable catalogs there makes the portal aware of each catalog and allows its catalog content to be presented in the portal experience. This supports organizations that separate offerings by audience, business unit, region, or type of request while still providing a unified customer-facing portal. Catalog and item visibility can then be further governed through the platform's normal catalog configuration and access controls, but the foundational step for making more than one catalog available to the Customer Service Portal is associating those catalogs with the portal record itself. ServiceNow's Service Catalog documentation describes support for multiple service catalogs and their availability configuration. See ServiceNow: Multiple service catalogs and ServiceNow: Service Catalog.

QUESTION NO: 32

From what places in SN can an agent create a case? (Choose three.)

A. Customer Service Application

B. Contact

C. Account

D. Chat

ANSWER: A B C

Explanation:

An agent can create a customer service case directly in the **Customer Service Application**, which provides the case-management workspace and case list from which agents open new records. Cases can also be created from a **Contact** record. Creating the case in that context associates it with the individual customer contact, helping the agent retain the customer's details and history while handling the issue. Likewise, an agent can create a case from an **Account** record. This supports business-to-business service scenarios by associating the case with the customer organization and making account context available during case handling.

These entry points reflect the CSM data model: a case is the central service record, while contacts and accounts supply the customer and organizational context needed to route, manage, and resolve the request. The Customer Service application is the standard operational location for agents, and the Contact and Account forms expose related case capabilities so agents can initiate service work without leaving the relevant customer record. See ServiceNow's Customer Service Management documentation and the Customer Service Case form reference.