

servicenow[®]

Complete and extend Salesforce

Elevate customer experiences with ServiceNow while maximizing Salesforce[®] investments



"A unified CRM platform integrates data across the front and middle offices, enabling improved data and analytics for greater insights and more informed decision-making to help improve customer engagement and enhance customer experience."

KPMG

"Unifying CRM," April 2022

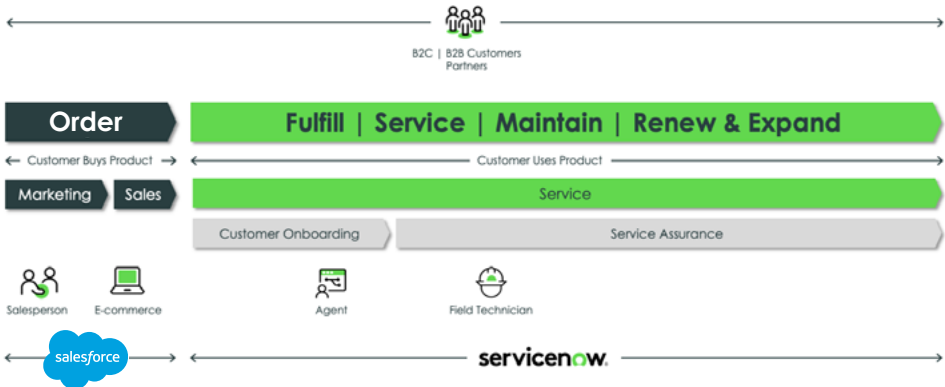
Great customer experience is the best differentiator

And customer service is your most important asset for delivering great end-to-end experiences

Customer experiences begin at the very first touch point with your company and continue throughout the customer lifecycle, as customers adopt, use, recommend, and make decisions on additional purchases.

Marketing and sales activities are key in these journeys; however, it's your customer service that makes up the lion's share of customer engagement opportunities. Customer service affects every aspect of customer experiences from order fulfillment, installation, ongoing service, renewal, and expansion through lasting loyalty.

Customer journey





Traditional customer relationship management solutions may neglect key areas of the customer journey.

While marketing and sales are needed to engage customers, flawless delivery of customer service is critical to customer retention.

Challenges for customers

- Helping themselves quickly via self-service requests
- Getting information regarding products, services, infrastructure, and devices they own
- Bouncing between agents, technicians, and other resolvers because departmental workflows are disconnected
- Giving vendors visibility into issues so customers can receive more applicable support

Challenges for organizations

- Assigning customer issues to other departments
- Gaining visibility into customer details and uncovering cross-sell opportunities
- Sharing customer product and service information across departments
- Increasing agent efficiencies and reducing costs



ServiceNow is a great partner. This is true transformation. The positive impact on our operations and our ability to provide a great end-to-end experience for customers has been extraordinary.”

Scott Thompson

Vice President, Technical Customer Service, Rogers Communications

Comprehensive customer service solution

Purpose-built, flexible, and easily integrated

Customer service solutions must be purpose-built to support service processes and embrace technologies such as AI, chatbots, and workflows. By managing service processes from onboarding to issue resolution, these solutions optimize productivity and reduce:

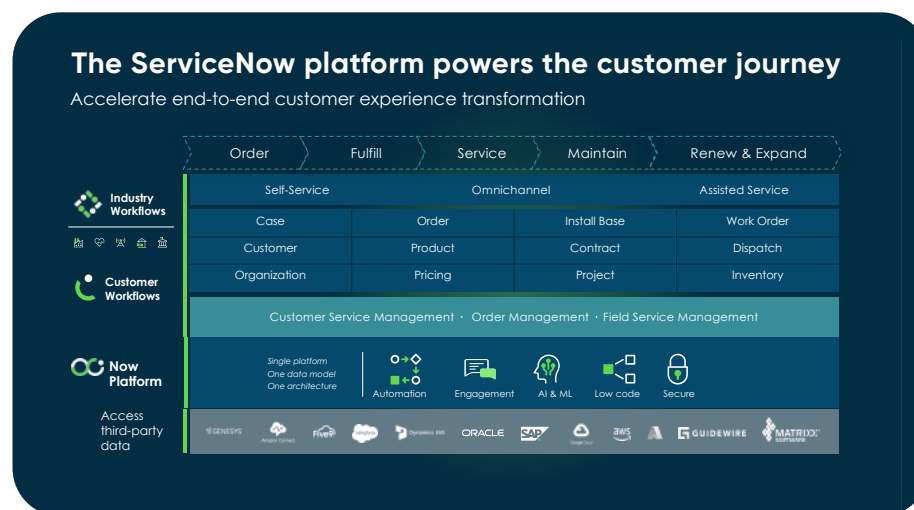
- Ongoing frustrations over delayed interactions
- Number of inquiries required to resolve any one issue or question
- Repeatedly providing basic profile and issue background information
- Lengthy processes made more complex when crossing departmental lines

To deliver seamless experiences, customer service platforms must integrate with sales, marketing, enterprise resource planning (ERP) systems, and middle- and back-office solutions. Most customer data resides in customer service and ERP/billing systems, and not in customer relationship management (CRM) or sales force automation (SFA) systems as often assumed. Customer service solutions need flexibility and the ability to provide seamless access to customer data and workflows used within an organization.

ServiceNow is designed for flexibility and integration

Exceptional customer experiences

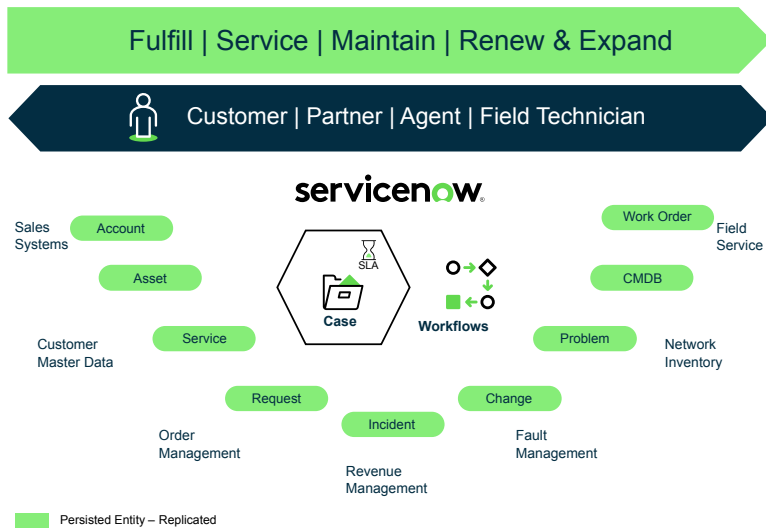
ServiceNow® Customer Workflows (CWF) include Customer Service Management (CSM), Field Service Management (FSM), and Order Management (OM). This solution streamlines customer service operations, reduces costs, and enables teams to deliver seamless customer experiences. It connects front, middle, and back offices together, empowering your teams to proactively address customer issues and enabling more self-service through automation.



Effectively address end-to-end customer issue resolution

ServiceNow and Salesforce together deliver visibility and access to everything from opportunities to quotes to contracts to service details, enabling a holistic view of the customer and driving complete and rapid issue resolution.

ServiceNow end-to-end service assurance

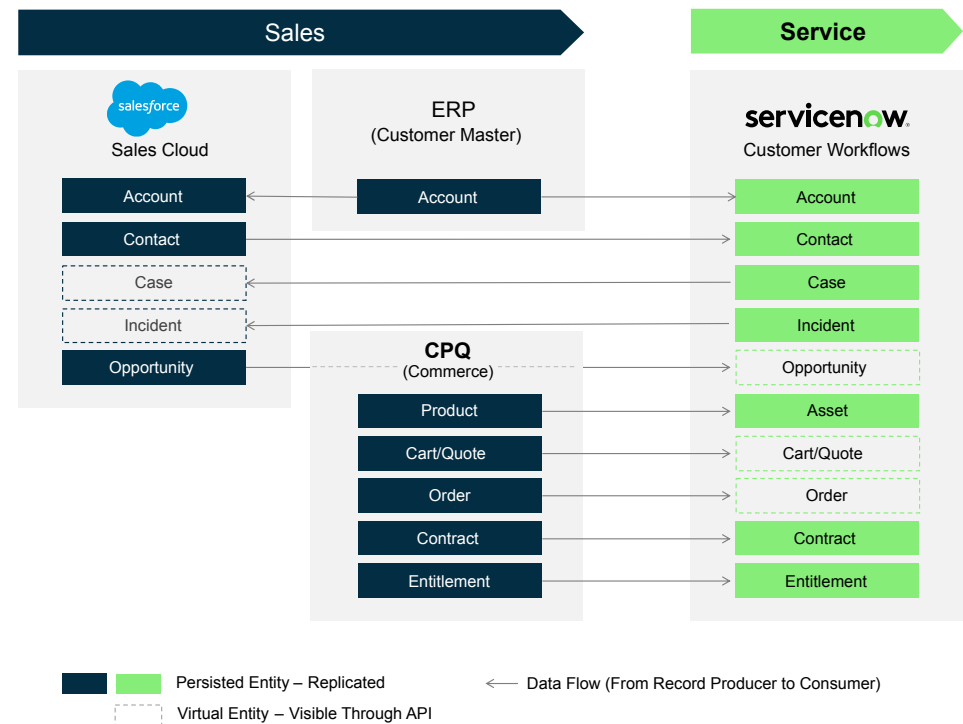


Improve operational efficiency with ServiceNow integrated service operations

- Provide a single system of action that spans customer engagement and service management
- Streamline cross-functional business processes with structured workflows
- Manage assets, services, and relationships that affect the customer experience

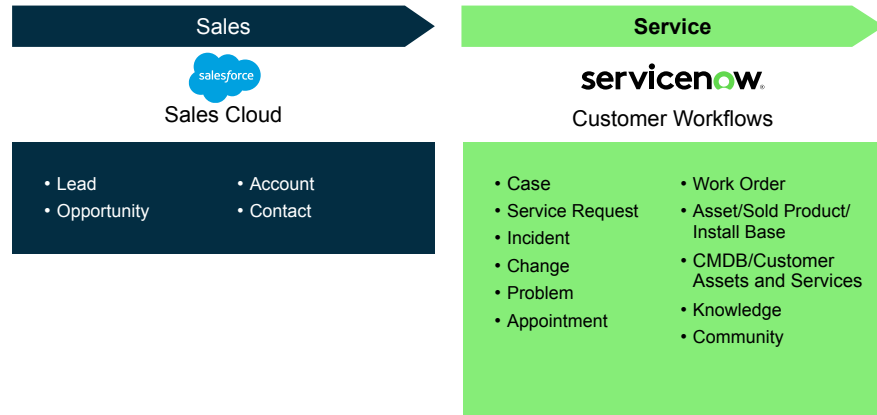
ServiceNow and Salesforce integration

ServiceNow provides seamless integrations with Salesforce Marketing Cloud, Sales Cloud, and Service Cloud. For example, you can expose ServiceNow information in Salesforce to ensure sales visibility into customer issues or integrate opportunity or contact information directly into ServiceNow account records without moving any data.



Salesforce Sales Cloud and ServiceNow Customer Workflows

Organizations that have deployed Salesforce Sales Cloud can extend it with ServiceNow Customer Workflows as the system of action.

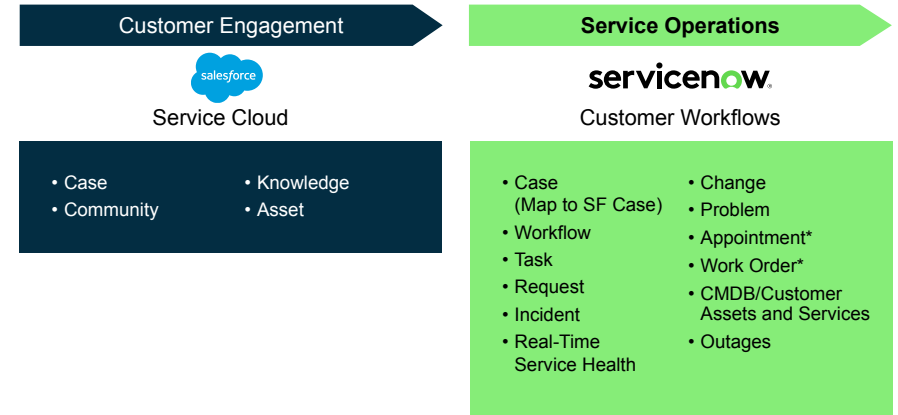


Benefits of Salesforce Sales Cloud and ServiceNow Customer Workflows complete and extend strategy

- Provides full visibility of complete order history, from opportunity to quote to order
- Ensures sales has the complete customer service context, displays ServiceNow cases and incidents in Salesforce
- Keeps sales and service up to date with the latest account information from opportunities or cases, notifies either system upon update
- Streamlines expansion and upsell opportunities, initiates opportunity from ServiceNow
- Creates service cases in ServiceNow from any customer touch point throughout the lifecycle and from any integrated system

Salesforce Service Cloud and ServiceNow Customer Workflows

Organizations that have deployed Salesforce Service Cloud can extend it with ServiceNow Customer Workflows as the system of action.



*If Salesforce is being used for field service, these objects could reside in Salesforce.

Benefits of Salesforce Service Cloud and ServiceNow Customer Workflows complete and extend strategy

- Powers cross-organizational workflows with service operations capabilities, unique in the customer service space
- Retains investment in Salesforce Service Cloud for customer engagement
- Enhances visibility using the powerful ServiceNow workflow to manage middle- and back-office tasks
- Keeps front-line customer service informed with the latest updates from middle- and back-office teams
- Enables proactive monitoring and visualization of impacted customers when problems with products or services occur
- Fixes the root cause of issues using the structured ServiceNow approach, driving down costs



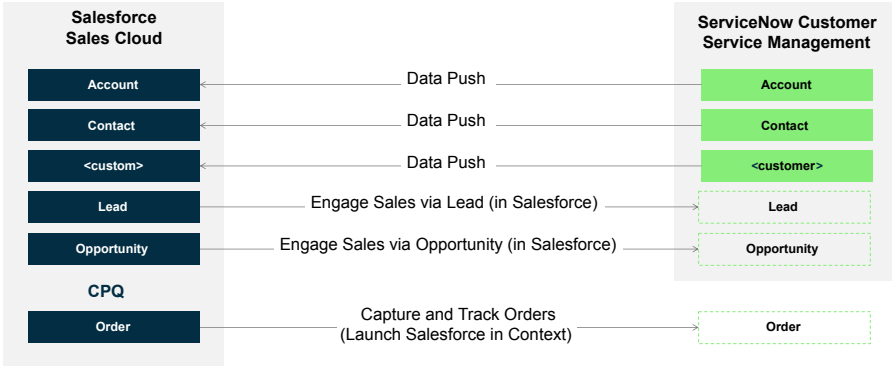
Integration scenarios

Driving improved efficiency and visibility

ServiceNow and Salesforce operate successfully in a variety of integration scenarios.

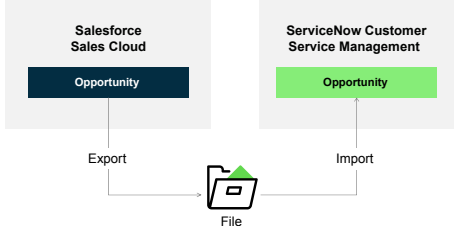
Account and opportunity sharing

Keep systems up to date with the latest information by pushing information changes from ServiceNow to Salesforce. Sales teams have the most recent customer data as well as visibility into customer inquiries.



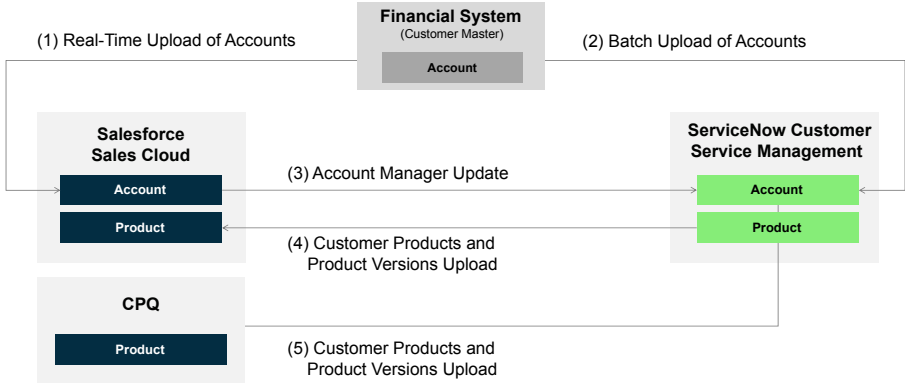
Import opportunities

Trigger updates when an opportunity is closed in Salesforce to ensure your entire organization has the latest account information and visibility.



On-demand account and product updates

Upload account information from your organization's financial system to ServiceNow and Salesforce. Ensure sales and service departments use accurate and up-to-date customer context. Provide this same information to your configure, price, quote (CPQ) system for accurate pricing, quoting, and configuration.



Examples of industry scenarios (more available upon request)

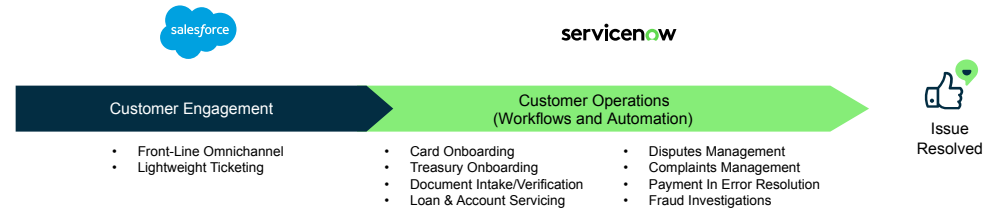


Banking

Salesforce: customer service intake

ServiceNow: dispute management process

Large bank achieved \$10M savings per year in reduced processing time plus fee avoidance for debit card disputes



Telecommunications

Salesforce: order capture

ServiceNow: order management and B2B service

Telecommunications company achieved customer lifecycle post order capture: fulfillment, account servicing, service assurance

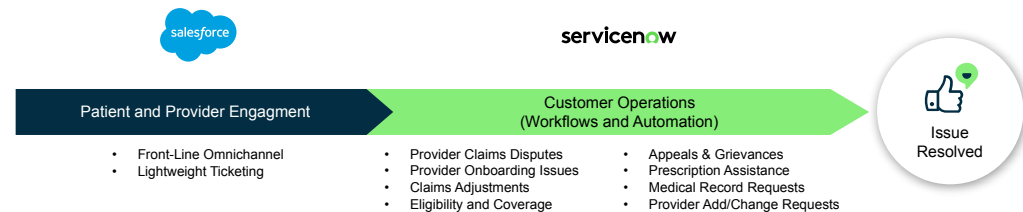


Healthcare

Salesforce: front-line phone and email

ServiceNow: exceptions claims management

Healthcare provider was able to orchestrate and route work across six different claims systems for 50 business units with 13K claims professionals



Deliver exceptional customer experiences

ServiceNow and Salesforce work seamlessly together to drive great customer outcomes

Using ServiceNow to complete and extend your Salesforce deployment brings benefits throughout the organization. Every customer touch point will be updated with the latest information, and the root cause of issues will be rapidly addressed.

ServiceNow improves end-to-end service assurance. Operational efficiency will increase by using a single system of action that extends from the initial customer inquiry to the resolution process. Easily streamline cross-functional business processes with structured workflows, and manage the assets and services that directly affect customer experience. And with Now Assist for CSM, agents can use generative AI to accelerate responses by quickly composing summaries of support cases, customer interactions, actions taken, and resolution steps.

FORRESTER®

180% return on investment

*"By consolidating these systems with ServiceNow Customer Service Management, the organization has achieved greater transparency, and the newfound ease in gathering customer data, coupled with transparency on both staff and customer sides of the system, has reduced the cost of SLA payments significantly."*¹

Forrester found that using ServiceNow Customer Service Management helped centralize support systems to increase transparency, improve customer satisfaction, increase agent productivity, and reduce reliance on costly legacy systems.²

Additional benefits of ServiceNow Customer Service Management include:

- 38% reduction in customer churn rate
- 20% reduction in SLA payments
- 24% decrease in case handling time
- 60% reduction in case volume
- 25% faster time to productivity for new agents

¹ "The Total Economic Impact™ Of ServiceNow Customer Service Management, a March 2019 commissioned study conducted by Forrester Consulting on behalf of ServiceNow"

² "Business Value Of ServiceNow Customer Service Management, an April 2019 commissioned study conducted by Forrester Consulting on behalf of ServiceNow"

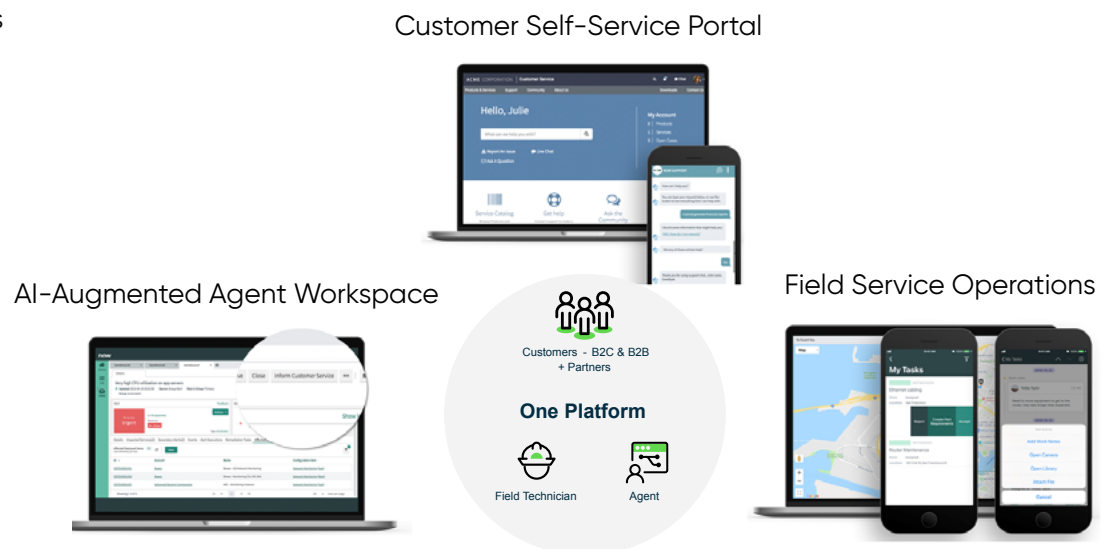
The ServiceNow Customer Workflows integrate customer engagement, service operations, and field service delivery to provide a seamless, closed-loop customer experience that helps to:

- Increase efficiency and fix the root cause of complex issues with seamless connectivity across your organization
- Proactively anticipate and intelligently fix potential problems before customers experience them
- Drive actions using personalized, self-service technology to instantly handle common customer requests
- Accelerate high-quality responses to customers using generative AI to gather the most relevant support case content
- Retain existing customers by minimizing frustration with traditional customer service roadblocks and notifying them of possible issues
- Maximize upsell, cross-sell, and word-of-mouth opportunities to reach new customers

Drive customer loyalty with ServiceNow

Ensure your end-to-end customer journey is seamless and provides the best customer experience possible by connecting existing best-of-breed solutions.

ServiceNow Customer Workflows platform





About ServiceNow

ServiceNow (NYSE: NOW) makes the world work better for everyone. Our cloud-based platform and solutions help digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow™. For more information, visit www.servicenow.com.

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