Yokohama Customer Success Management

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Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550

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Customer Success Management

The ServiceNow® Customer Success Management application enables service providers to streamline, automate, and measure critical workflows across the entire enterprise customer journey—from onboarding and adoption to renewals.

Watch this short video for an introduction to the Customer Success Management application.

https://player.vimeo.com/video/1063358476?h=f0630a270f&badge=0&autopause=0&player_id=0&app_id=58479

By embedding workflow automation into customer success management, Customer Success Management helps providers enhance customer experiences, accelerate time to value, and maximize return on investment. It also fosters seamless collaboration between the accounts, sales, and delivery teams, all within the unified ServiceNow AI Platform.

Get started

Explore Account Lifecycle Events	Account onboarding	Customer success
		
Learn about the Account Lifecycle Events application	Define a structured, repeatable, onboarding experience with the preconfigured playbook.	Track success objectives, outcomes, help mitigate risks, and identify opportunities for expansion and renewal.

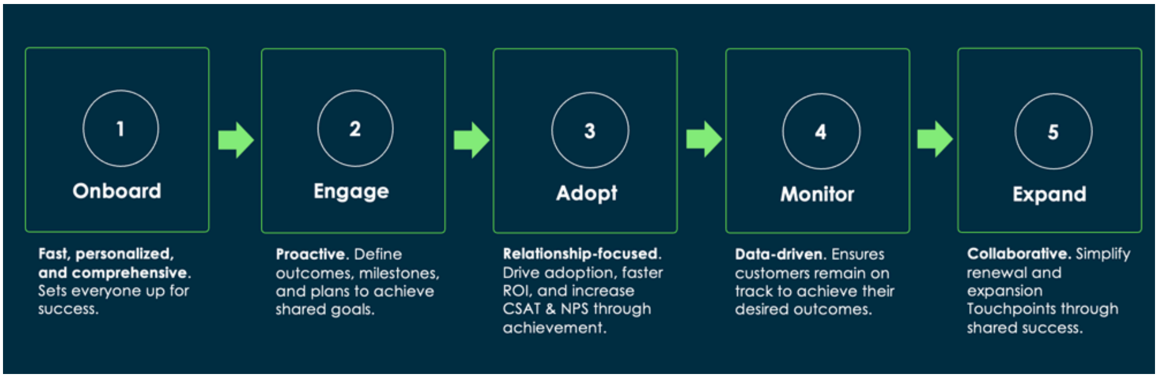
Additional resources

- Learn more about what's new and changed, see the Account Lifecycle Events release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Service Management features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Customer Success Management

Customer Success Management enables technology industry providers to create a structured onboarding experience, define and track objectives, outcomes, milestones, and plans to achieve shared goals.

The following diagram shows the different tasks involved in the Customer Success Management life-cycle that can be managed by this application.



Customer Success Management features include the following:

- Onboarding: Understand customer needs and expectations and define a repeatable, transparent workflow that can be followed during the onboarding process.
- Engagement: Track success objectives, milestones, and ensure that outcomes are met.
- Adoption: Position how to make the most out of the products available and take steps to improve product usage.
- Monitoring: Monitor product and service usage along with other key metrics such as KPIs and identify renewal and expansion opportunities.
- Expansion: Assist sales and account teams in identifying renewal and expansion opportunities.

Customer Success Management features

- Account onboarding: Create a structured onboarding experience while enabling collaboration and transparency with internal and external stakeholders during the onboarding process.
- Customer success: Track success objectives, outcomes, help mitigate risks, and identify opportunities for expansion and renewal.

Activate Customer Success Management

The Customer Success Management (com.sn_acct_lc) plugin is available as a separate subscription. This plugin activates related plugins, if they aren't already active.

Before you begin
Role required: sn_customerservice.customer_admin

About this task
The Customer Success Management plugin activates these related plugins, if they aren't already active.

Plugins for Account Lifecycle Events

Plugin	Description
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.

Plugins for Account Lifecycle Events (continued)

Plugin	Description
Playbook Experience [com.playbook_experience]	Enables you to customize the default Playbook user experience to create your desired business process workflow.
Record Related Items Connected [com.snc.sn_record_related_items_connected]	Enables record related items.
Playbooks for Customer Service Management [com.sn_csm_playbook]	Guides customer service agents through the various tasks to resolve customer issues, and visualizes the entire lifecycle across diverse and siloed processes.
Technology core [com.sn_ti_core]	Technology industry vertical Customer Service Management extensions.
Guided Decisions Experience [com.snc.guided_decisions_playbook_experience]	Enables activity types, definitions, and UI components for the display of guided decisions in a playbook on Workspace.
Customer Service Case Types [com.snc.csm_case_types]	Activating this plugin enables the system administrator to create and manage case types.
Record lookup [com.snc.sn_record_lookup]	Record lookup component used to easily search and link a record from a table.
Data Context Engine [com.sn_data_ctx_engine]	Allows for the creation and measuring of metrics and resolving them to specific context (such as success engagements) within the platform.
Touchpoint meetings [com.sn_meeting_mgmt]	Enables creation and management of one-time or recurring meetings with customers within the Touchpoint record.
Document management [com.snc.platform_document_management]	Allows customer success managers to store complex documents that can be saved as attachments or in the Knowledge Base.
Roadmap [sn_roadmap]	Allows customer success manager to see and plan the roadmap of success initiatives tied to success objectives and outcomes.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.
   You can search for the plugin by its name or ID. If you can’t find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install**, and then in the Activate Plugin dialog box, select **Activate**.

Note: When domain separation and delegated admin are enabled in an instance, you must be in the **global** domain. Otherwise, the following error message appears:

```
Application installation is unavailable because another
 operation is running: Plugin Activation for <plugin name>
```

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Account onboarding

Create a structured onboarding experience while enabling collaboration and transparency with internal and external stakeholders during the onboarding process.

Explore Learn about the account onboarding playbook and its key features.	Configure Set up and configure the Account Onboarding playbook.
Use Use the playbook to onboard customers	Reference Get information about the data model and installed components

Exploring account onboarding

The account onboarding solution enables technology industry providers to define a structured, repeatable, onboarding experience. It enables collaboration, transparency, and insight for both internal staff members and external customers involved in the onboarding process.

The account onboarding solution includes a playbook, an accounting onboarding case type, and defined case tasks that support this important process. You can use the playbook as a template or as a starting hover over build your onboarding experience.

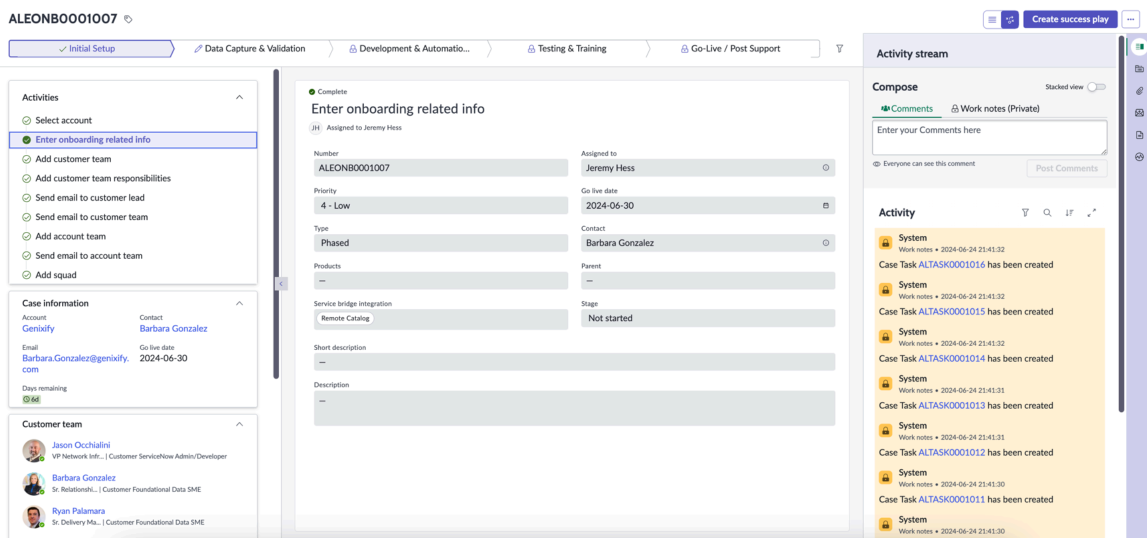
Account onboarding includes the following:

- Playbook: A playbook that serves as a starting point to build a repeatable onboarding process that meets business requirements.
- Onboarding cases: A central record for the onboarding team including dedicated tasks to assign work, automate, and capture data.

- Case tasks: Case tasks that can be used by internal and external stakeholders to track actions, next steps, and risks needed for the onboarding workflow to be completed.
- Data import: Import, manage, and publish data gathered from internal and external stakeholders.

Account onboarding playbook

The account onboarding playbook has preconfigured activities to help bootstrap the creation of the onboarding experience. Within the playbook, there are five core activities that can be reused to create a number of actions across the whole workflow. The playbook serves as a template and can be configured by service providers to meet their business requirements.



The playbook visualizes a workflow in a simple, task-oriented view. The workflow for the account onboarding playbook is created using the Process Automation Designer and can be configured based on your requirements. See Configure the account onboarding playbook using Playbooks for details. The playbook is divided into multiple stages or lanes.

As you mark an activity complete in a stage, you move to the next activity. You can save an activity at any time and return to the playbook later. After you complete all the activities in a lane, you move to the next lane. As you complete activities and lanes, the status is reflected in the contextual side panel. An Activity log in the contextual side panel shows all the data that you've entered for each activity. For more details on playbooks, see Playbook layout and features.

Account onboarding workflow

The account onboarding workflow involves the following stages:

- The Customer Service Management agent creates a customer account. This task automatically creates an account onboarding case.
- The account onboarding playbook is launched.
- The case is managed by the onboarding manager who uses the playbook to manage the end-to-end workflow.

Configuring account onboarding

Set up and configure the Customer Success Management application.

This section covers the following:

- Create an account onboarding case
- Activate Customer Success Management
- Set up the account onboarding playbook
- Configure the account onboarding playbook using Playbooks
- Set up Recommended Actions for account onboarding
- Run scheduled job to back up staging table

Set up the account onboarding playbook

Use the account onboarding playbook to import, stage, manage, and publish account data.

Note: Some features in the account onboarding playbook are not working correctly. To address this issue, you must install Playbook Experience 26.1.2 from the ServiceNow Store. For more details on the issues, see KB1651378.

An account boarding case is created in two ways:

- When a customer account is created, the **Creation of account onboarding case** flow is initiated and an account onboarding case is generated. You can configure various tasks in the playbook that involve identifying the key people handling the case, import data, and create collaborative tasks.
- If a customer account exists, and the account onboarding is being done in a phased manner, you can create one or more account onboarding cases from the **List** view. See Create an account onboarding case for details.

When you open the account onboarding case, you're directed to the first activity in the Initial setup stage. While working on the activities, you can view:

- The entire playbook process in the horizontal stage picker.
- The activities in each stage in the stacked playbook activity view.
- Related items, activity stream, and recommended actions in the contextual side panel. Select the links in the Related items card to navigate to the record page.

The Customer Success Management playbook includes the following stages and activities that can be used in the account onboarding process.

- Initial setup
- Data capture and validation
- Development and automation
- Testing, training, and go-live

Create an account onboarding case

When the customer service agent creates an account, an account onboarding case is generated.

Before you begin

Role required: sn_acct_lc.agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Account Onboarding Cases** > **All**.
3. Click **New**.
   The account onboarding playbook is launched. You can configure the various activities and create the account onboarding case. See Set up the account onboarding playbook for details.

Initial setup

This phase is meant to gather the initial information needed to successfully onboard a customer. For example, gathering core information such as onboarding manager, key customer contact, internal and external stakeholders, their responsibilities, and so on.

Activity	Details
Select account	When you select the customer account, a new account onboarding case is generated. **Note:** If the account onboarding case was generated from a case, this field is auto populated. Click **Continue** to go to the next activity.
Enter onboarding related info	The next activity in the playbook involves gathering onboarding related information. The mandatory fields to be entered are: • Assigned to: Select the provider agent who is working on this case. • Service Exchange integration: Select one of the following options: ○ Not required: No Service Exchange integration is required. ○ Remote catalog: A Service Exchange integration for the remote catalog feature is required.

Activity	Details
	◦ Remote task: A Service Exchange integration for the remote task feature is required. ◦ Foundation data sync: A Service Exchange integration for the foundation data sync feature is required. • Type: Select one of the following: ◦ Phased: A specific part of the onboarding process for this customer is managed through this Customer Success Management onboarding case. ◦ Full: The entire onboarding process for this customer is by this Customer Success Management onboarding case. • Specify the Go live date and select **Mark complete** to proceed with the next activity. **Note:** The State field is set to **New** for a new record. If this field is updated, the Stage field is automatically updated based on the predefined mapping. This mapping is also available for account onboarding case tasks between the Progress and State fields. See Field mapping for account onboarding cases and case tasks for details.
Add customer team	Add the customer contacts who will work on the account onboarding case. • Enter the First name, Last name, Email address and click **Add** to create a new customer contact. • Select **Mark complete** to move to the next step.
Add customer team responsibilities	Assign responsibilities to each of the customer contacts that have been added. • Select the Contact you've added in the previous step. • In the Responsibility field, select one of the predefined user roles and click **Add** to assign responsibility for the customer contact. • Click **Mark complete** to move to the next step. When this step is completed, two emails are automatically generated. The first email identifies the primary point of contact for the account onboarding case. The second email identifies the key team members participating in the onboarding process.

Activity	Details
Add account team	Add and assign responsibilities to the internal team members (service providers) working on the account onboarding case. This includes the ServiceNow administrator handling the case. After the account is added, an email is sent to all the team members. • Select a predefined user role in the **Responsibility** field. • Select a user who is assigned this role and click **Add** to assign responsibility to the team member. • Click **Mark complete** to move to the next activity. **Note:** By default, all tasks in the playbook are assigned to the provider's ServiceNow administrator.
Add squad	Add the squad members who will be involved in completing the onboarding case and other activities. This is an optional activity. Click **Mark complete** to move to the next stage.

After the Initial Setup stage has been completed, the case information, account, customer, and squad team member information you have added is displayed in the left panel.

Field mapping for account onboarding cases and case tasks

For account onboarding cases, when the Stage field is updated, the State field is automatically updated based on the mapping shown below:

Account onboarding case mapping between State and Stage fields

State	Stage
New	Not started, At risk
Unassigned	Not started, At risk
Active	On track, At risk
Blocked	Paused, At risk
Closed	Finished
Canceled	Finished

For account onboarding case tasks, when the State field is updated, the Progress field is automatically updated based on the mapping shown below:

Account onboarding case task mapping between State and Progress fields

State	Progress
Open	Not started
Awaiting customer	Paused, At risk
Awaiting internal	Paused, At risk
In Progress	On track, At risk
Review	On track, At risk
Closed	Finished
Canceled	Finished

If you are using an earlier version of the Customer Success Management application, follow the instructions in KB1651427 to correct the mapping between these fields.

Data capture and validation

This phase is meant to gather the necessary information about the account such as support contacts, locations, sold products, entitlements, and so on.

Stage	Activity
Data Capture & Validation	In this task, select the type of activity being performed: • Data capture: Denotes important data being imported into the system. • Risk mitigation: Denotes a risk associated with the onboarding of this customer that must be managed. • Development: Tracks an internal or external development action that is required. • Training: Denotes a training activity required before the go-live date. • Testing: Denotes a testing activity required before the go-live date. The following default tables are available with the base system: • Customer contacts • Location • Service entitlement • Install base item • Account address relationship • Contract • Sold products • Install base M2M sold products

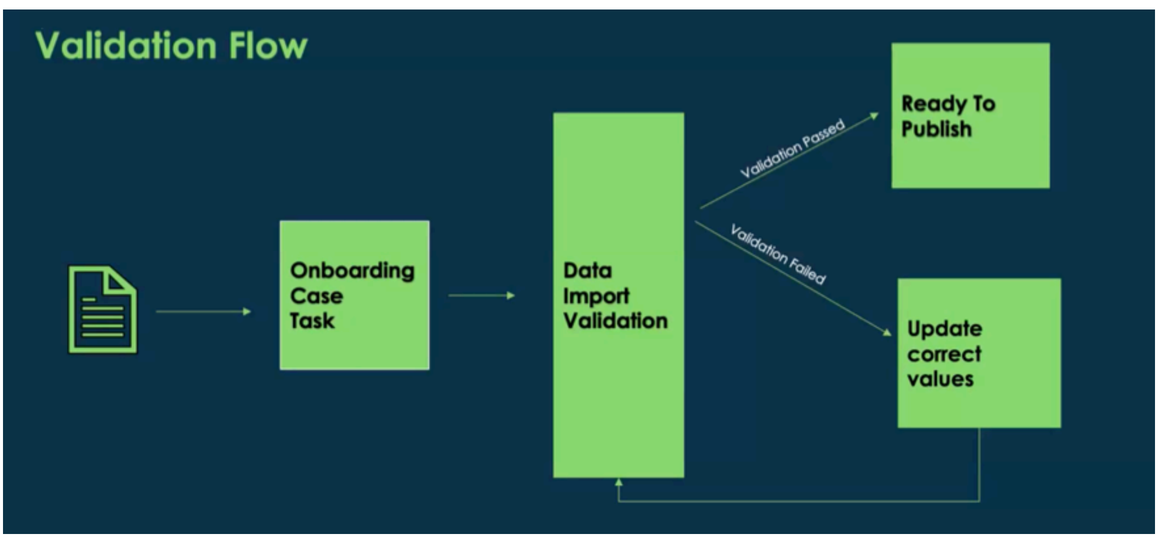
Stage	Activity
	Custom conditions have been defined and field values in these tables like source table, target table, and data source are auto populated in each of these tables. You can use these flows by directly importing data into these tables and publish them when they're ready. For details on importing data into these tables, see Import data into the account onboarding playbook. These tables have been configured with specific conditions and field values have been auto populated. You can modify these tables, add new tables, and activities depending on your requirements using the Process Automation Designer. See Configure data validation using the Data Validation Assist table for details.

Review the data in the Summary activity and click **Mark Complete** to move to the next stage.

Account onboarding data validation flow

This section describes how the data is imported from an external file, validated, and published to the target table.

See the following diagram to view the flow of data from the upload stage to the final stage when it's published.



The data import flow involves the following steps:

1. The customer uploads an Excel file as an attachment to the account onboarding data import task.
2. The data is loaded to the staging table and validated to ensure that only the correct data can be published and moved to the target table. Several pre-defined validations are available with the base system. You can create additional validations or use a custom script if required. See Configure data validation using the Data Validation Assist table for details.
3. When the validation has been completed, the data is moved to one of the following categories:

4. ◦ Ready to publish: The data meets all the validation conditions and can be published.
   ◦ Needs attention: Review the records that are in the **Needs attention** state, resolve the errors, and select **Save**. These updated records are moved into the **Yet to validate** state.

Configure data validation using the Data Validation Assist table

Create field and record level validations in the Data validation assist table.

Before you begin

Role required: admin

About this task

Several pre-defined validations are available with the base system. When data is imported during the account onboarding process, these validations are used to validate the data. But you can define additional validations based on your requirement.

Procedure

1. Navigate to **All** > **Account Lifecycle Events** > **Data Validation Assist Support** > **Data Validation Assist** table.
2. Click **New** to open the Data Validation Assist record.
3. Select the Validation type which can be Field level or Record level.
4. For Field level validation type, you can select one of the following Validation sub types:
   - Reference: Select the Reference table, Reference table field, Staging table, and Staging table field. Specify the reference fields in the staging table. A reference field stores a reference to a field on another table. When you define a reference field, a relationship is created between the two tables.
   - Choice: Select the Target table, Target table field, Staging table, and Staging table field. Used to validate if the value specified in the Excel is present.
   - Date: Select the date format, Staging table, and Staging table field.
   - Datetime: Select the date and time format, Staging table, and Staging table field.
   - Boolean: Select the Staging table and Staging table field. Checks for a true or false result.
   - String character limits: Specify the Max length, Staging table, and Staging table field. Used to validate if the string length does not exceed the limit specified.
   - Integer or decimal: Specify the Staging table and Staging table field. Used to validate if the field is an integer or a decimal number.
5. Select the **Mandatory** check box to specify if a validation condition is mandatory.
6. For Record level validation type, you can define custom scripts to validate the staging table records.
   The following is an example of a sample validation script.

```
(function executeCondition( /* glide record */ stagingTableGr)
 {
    var obj = {
        validationPassed: true,
        message: ''
    }; /*      validationPassed : return true if validation
 passed else return false      message : populate error message
 if validationPassed is false else return empty string     */
    if (global.JSUtil.notNil(stagingTableGr.task) &&
 global.JSUtil.notNil(stagingTableGr.u_company)) {
```

```
        if (stagingTableGr.task.company.name !=
 stagingTableGr.u_company) {
            obj.validationPassed = false;
            obj.message = 'The Account is not matching with the
 Case Account.';
        }
    }
    return obj;
})(stagingTableGr);
```

7. Click **Submit** to create a new validation assist table.

Configure the account onboarding data import task

Use the Import Builder to configure the account onboarding data import task.

Before you begin

- Role required: sn_acct_lc_agent
- One or more Playbooks roles. See Playbooks roles for details.
- Ensure that you are in the same application scope in which the target table is present.

Procedure

1. Navigate to **All** > **Account Lifecycle Events** > **Data Validation Assist Support** > **Import builder**.
2. Click **New**.
3. In the **Create template** tab, enter the name and select the `Target table` from the drop down list.
4. Click the Attachments icon, upload an Excel template and click **Continue**.

   Note: The label names in the attached template must match the field names in the target table.

5. In the Data source step, you can modify the default `Import set table name` and click **Continue**.
   The data source is created and is displayed in the Data Source tab in the Related List. Click the *Name* link to view the data source. Note that the Name field shows the data source name with the prefix *ALE DS* followed by the name of the Import set table name. The internal name of the Import set table is also displayed.
6. In the Transform map step, you can modify the default `Transform map name` and click **Continue**.
   The transform map is created and displayed in the Transform Map tab in the Related List. Click the *Name* link to navigate to the transform map and view the following:
   - Source table: This is the Import set table which contains the staging data.
   - Target table: The table to which the staging data will be moved.
   - Field maps: Shows the mapping between the fields in the source and target tables.

   The Data validation assist list view with the different types of validations is displayed.
7. Click **New** (optional step) to create a new field level or record level validation or navigate back to the Import Builder page.
8. In the Playbook activity step, navigate to the UI Views tab in the Related List.

Note the two list views that have been created. These lists appear in the Data Import step of the account onboarding playbook.

9. Click **Continue** and navigate to the Activity Definition tab in the Related List.
   Note that a new activity definition has been created and the Import Builder process is now complete.

What to do next

You can now add this newly created activity definition in the Process Automation Designer and create a new task for the account onboarding playbook by following the instructions in Add the data import task

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Add the data import task

Add the data import task that you've configured to the **Account lifecycle onboarding process** defined in the Process Automation Designer.

1. Navigate to **All** > **Process Automation Designer**.
2. Select the **Account lifecycle onboarding process**.
3. Navigate to the Data Capture & Validation lane and select **Add an activity**.
4. Select **Account lifecycle events** and select the **Create & View Tech Task Record**.
5. Select the **Edit** icon on the newly added task to view the properties.
6. Select **View all properties** and select **Advanced**.
7. In the General tab, enter the label name and description.
8. In the When to start field, select **With Previous**. This option enables you to execute all the activities in the task in parallel.
9. Select the Automation tab and in the Inputs section, enter the following:
   - Table: The table for which the record is being created. Select **Account Lifecycle Import Task (sn_ti_core_imp_task)**.
   - Canceled Conditions: Specify the conditions that must be met before the task moves into the canceled state.
   - Closed Conditions: Specify the conditions that must be met before the task moves into the Closed state.
   - Onboarding Case: Select the Account Onboarding Case Record trigger to associate this record with the account onboarding case.
   - Record View: The name of the Form View that is to be displayed in the Customer Success Management playbook. Enter *`tech_pad_imp_task_view`* here.
   - Responsibility Name: Select the ServiceNow Developer/Admin user role from the list. This role is assigned to the internal team members (defined in the Assign internal team responsibilities task of the **Initiate** stage of the playbook. See Set up the account onboarding playbook for details). Users with this role can perform the data import task.
10. Select **Add Field** and enter data in the following fields from the Customer Success Management Import Task table.
    - Source Table: Add the internal name of the staging table. For example, `sn_acct_lc_account_onb_import_locations`.
    - Target Table: Add the internal name of the target table. For example, `cmn_location`.
    - Data Source: Select the data source. For example, `cmn_location_template.xlsx`.

- Data Import State: The default value is set to 1 (Data not loaded yet).
- State: The default state is set to 1 (Open).
- Type: `Select data_capture`.
- Account: Select the account onboarding case associated with the case task.
- Parent: Select the parent record associated with the account onboarding case.
- Visible to customer: Set this **False.**

Enter the Subject and Description as required and select **Done**

11. Ensure that you test the configuration and then select **Activate** to activate the playbook.

After the data import task has been configured, the Customer Success Management playbook can be used to onboard customers. See Set up the account onboarding playbook for details.

Import data into the account onboarding playbook

As part of the Customer Success Management process, you can import, configure, and publish data.

Before you begin

- Role required: admin

About this task

After completing the first stage in the Customer Success Management playbook, you can continue with the **Data Capture & Validation** stage. In the header section, you can see the account name, person it is assigned to, days remaining, account status, and the data import status. Several default tables have been configured with the base system.

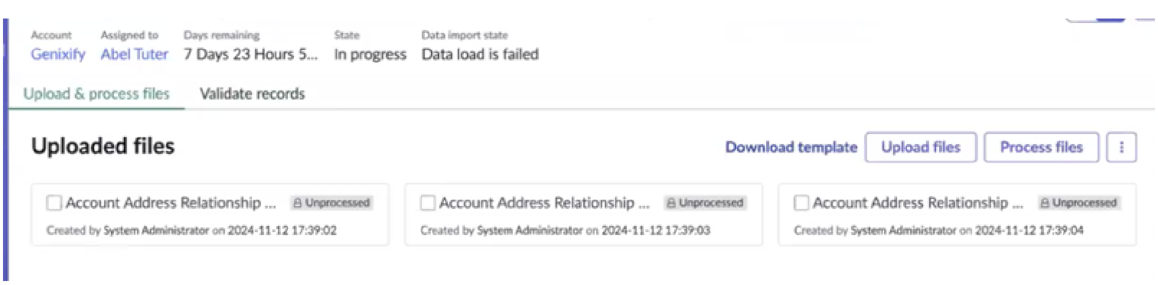
To import data into these default tables, follow these steps:

Procedure

1. In the *`Upload & process files`* tab, click **Upload files**.
2. In the Upload files window, click **Add file**, select the file and then click **Upload**.

   Note: Ensure that the XLSX file contains the accurate data that will pass all the pre-defined validation checks or any custom validations that have been defined.

   The uploaded file appears in the Upload & process file page.



   You can upload multiple files. For each uploaded file, the name of the file, the date on which it was uploaded, the person who uploaded the file, and upload status (Unprocessed) is displayed.

3. Select one or more files to be uploaded, and click **Process files**.
   If any of the files being uploaded contains validation errors, none of the files get uploaded to the staging table and an error message is displayed. You must fix all the errors before

uploading the files. If there are no validation errors, you will see a message indicating that files are being uploaded and once the process is complete, the upload status changes to *`Processed`*.

4. Navigate to the *`Validate records`* tab.
5. When the `Data has been successfully validated! Please check the staging table.` message appears, the records are moved into one of the following states:
   - Ready to publish: The records have no validation errors and can be published.
   - Needs attention: Records in this state have some issues that must be addressed.
   - Yet to validate: Records in this state haven't been validated.
6. Review the records in the *`Needs attention`* state, verify the information in the Comment column, and modify the record if required, and click **Save**.
7. After editing the record, navigate to the *`Yet to validate`* list, and click *`Validate`*.
8. When all the records are in the *`Ready to publish`* list, select the records to be published, and click **Publish**.

   Note:
   - If you are importing multiple files at a time, the data import process may slow down.
   - While the data is being validated, you can click **Add more** to import more files and process them in parallel.
   - If the imported data is corrupted or has several errors, select **Restart**. This action clears all the data in the staging table and restarts the process from the beginning. Data in the *`Ready to publish`* state will also be cleared.
   - Click the **View details** toggle icon to view the record details.
   - Click **Close task**. Enter the Close notes and click **Close Task**. The State field is updated to *`Closed`* and the Progress field is updated to **Finished** and the data import task is closed.
9. Select **Close**.
10. Review the Data Import Summary, enter Close Notes for each task, and select **Mark complete** to continue with the next stage in the playbook.

What to do next

- Click **Discuss** to start a sidebar discussion about this data import task. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this onboarding case. Click **Open record** to open the record and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Open the Activity stream and select **Email** from the More drop down list. Enter the required details and click **Send email**.

  Note: You can send emails only to the team members associated with the account.

Development and automation

This phase is meant to track important activities such as setting up account relationships, maintenance schedules, defining SLAs, Service Exchange installation (if required), and ensuring that they are completed.

Stage	Activity	Details
Development & Automation		The following activities are available with the base system: • Setup account relationships • Set maintenance schedules • Create process SLAs and offerings • Reporting • Catalog development (general) • Related work **Note:** If you have selected any of the Service Exchange integration options in the Initial Setup stage, the relevant activities are displayed and you can configure them as required. These are demo tasks and can be configured according to your requirements. You can add or delete tasks, and modify them as required. In the Related work activity, you can create ad-hoc tasks if required. See Configure simple Customer Success Management playbook tasks for details on simple configuration tasks.

Review the data and click **Mark Complete** to move to the next stage.

Testing, training, and go-live

These two phases are meant to ensure that customers have been involved in testing and have received adequate training. This ensures that all the steps are complete before the go-live date.

Stage	Activity	Details
Testing & Training		The following tasks are available with the base system: • Go-live change request • Plan and complete go-live communications • Plan and complete training • Execute training Click **Mark Complete** to go to the next stage.
Go-Live /Post Support		Go-live support case

Stage	Activity	Details
		The primary case related to any onboarding issues that are a result of go-live. The onboarding team will work with the appropriate teams to resolve any outstanding issues.

After you have created the account onboarding case, you can perform the following activities:

- Click **Discuss** to start a sidebar discussion about this onboarding case. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this onboarding case. Click **Open record** to open the record and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Click **Create success play** to create automated actions that need to be performed during an engagement lifecycle. See Create a success play for details.
- Open the Activity stream and select **Email** from the More drop down list. Enter the required details and click **Send email**.

  Note: You can send emails only to the team members associated with the account.

Close or cancel an account onboarding case

You can close or cancel an account boarding case and all the related activities.

Before you begin

Role required: sn_acct_lc.agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and click the **List** icon.
2. Navigate to the **Customer Success** > **All Onboarding Cases** and open the onboarding case you want to cancel.
3. Click the **Record details** to view the account onboarding case form.
4. To cancel the account onboarding case, follow these steps:
    - Change the State to **Canceled**. A popup message asking to confirm the cancellation is displayed. Click **Yes** to confirm. The Resolution code is automatically updated to `Voided/Canceled`.
    - Ensure that all the mandatory fields are filled out and click **Save**. The account onboarding case is canceled.
5. To close the account onboarding case, follow these steps:.
    - Change the State to **Closed**.
    - Select the Resolution code from the drop down list:
        - Successful - No issues
        - Successful - With issues
        - Unsuccessful - Unable to complete
        - Voided/Cancelled

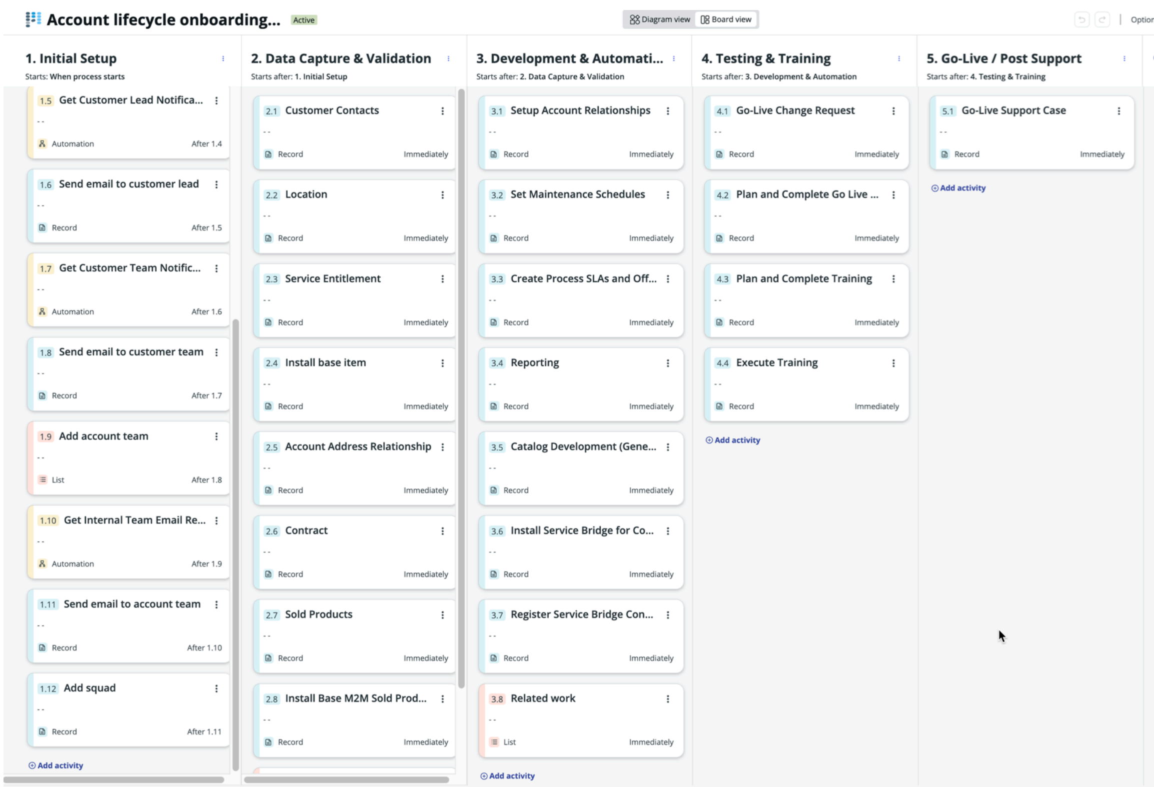
- Ensure that the rest of the mandatory fields are filled out and click **Save**. The account onboarding case is canceled.

> **Note:** Before you close an account onboarding case, you must close or cancel or the related account onboarding case tasks. If an associated child task is still open, a warning message is displayed. You must first close or cancel the child tasks and then proceed with closing the account onboarding case.

Configure the account onboarding playbook using Playbooks

Use Playbooks in Workflow Studio to configure the Customer Success Management playbook.

In Playbooks, an activity represents one step in your overall business process. You can sequence many activities together in the stages of your process. A stage is made up of many sequenced activities that are grouped in a logical way. You can add or create your own activity definitions, or delete an activity that is not required. For more details, see Playbooks.



Configure simple Customer Success Management playbook tasks

You can configure simple playbook tasks using the Playbooks.

Before you begin

Role required:

- sn_acct_lc.agent
- One or more Playbooks roles. See Playbooks roles for details.

About this task

You can add, modify, and delete any tasks for the Customer Success Management playbook using the Process Automation Designer. For example, if you want to configure one of the tasks in the Development & Automation lane, perform the following steps.

Procedure

1. Navigate to **All** > **Process Automation Designer**.
2. Select the **Account lifecycle onboarding process**.
3. Navigate to the Development & Automation lane and select the Setup Account Relationships activity.
4. In the Activity properties window, select **View all properties** and select **Advanced**.
5. In the General tab, enter the label name and description.
6. In the When to start field, select **With Previous**.
   This option enables you to execute all activities in the task in parallel.
7. Select the Automation tab and select **Accounts Lifecycle Task** table.
8. Add all required fields and any other fields that must be populated for this task in the Customer Success Management playbook.
9. Select **Done** and then **Activate**.

Set up Recommended Actions for account onboarding

Set up recommended actions to display relevant recommendations in the account onboarding playbook.

Before you begin

Role required: sn_acct_lc.agent

Procedure

1. Create a rule in Recommended Actions for Customer Success Management.
   For more information, see Create a rule in Recommended Actions.
2. Create a recommendation.
   For more information, see Create a recommendation in Recommended Actions.
3. Create a resource generator.
   For more information, see Create a resource generator in Recommended Actions.
4. Create guidance and field recommendations.
   For more information, see Creating guidance and field recommendation in Recommended Actions.

Run scheduled job to back up staging table

You can take a backup of the data on the staging table at periodic intervals.

Before you begin

Role required: admin

About this task

Data present in the staging table backed up if:

- Import tasks are in an **Active** state.
- Data creation date is earlier than the current date.

Note: Import tasks that are in a **Canceled** or **Closed** state aren't backed up.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Find the **Scheduled Staging Data Backup Job** scheduled job.

   Note: The job is inactive by default. Select the **Active** check box to run the scheduled job at the scheduled time.

3. Select **Execute Now**.
   To configure the backup period, specify a number in the Value field for the `sn_accct_lc.BackupDays` system property. For example, if the Value field is set to 2, data that is more than two days old is included in the backup.

Result
A CSV file is created and attached to the import task. The file name includes the name of the staging file and the creation date in the format `stagingTable-dateCreated.csv`.

Using account onboarding

With the account onboarding solution, service providers can repeatably define, measure, and collaborate with customers on the activities needed to onboard rapidly.

This section covers the following:

- Account onboarding landing page
- View account onboarding cases in the Customer Service Portal
- Recommended actions available with account onboarding
- Create a success play for account onboarding
- Related items component in account onboarding case page
- Account onboarding Knowledge Base

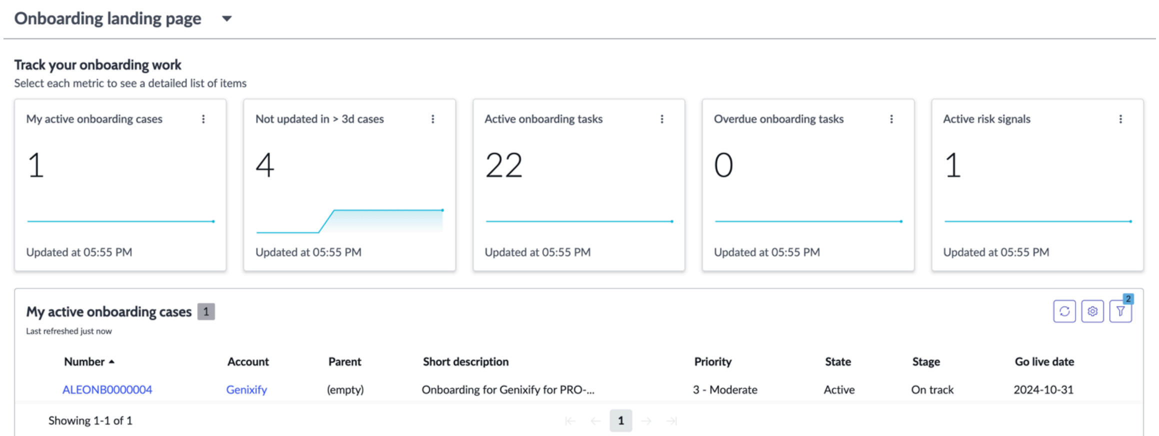
Account onboarding landing page

Get real time visibility into your onboarding cases and track your onboarding tasks.

As a onboarding agent (sn_acct_lc_agent), you can use this page to quickly scan and prioritize their onboarding cases and tasks. The following score cards with real time data are displayed:

- My active onboarding cases: Number of active onboarding cases assigned to you.
- Not updated in >3d cases: Active cases that have not been updated in more than 3 days and are not in a Closed or Canceled state.
- Active onboarding tasks: The total number of onboarding tasks across all active onboarding cases which are not in a Closed or Canceled state.
- Overdue onboarding tasks: Number of case tasks that are currently overdue and have passed the due date.
- Active risk signals: Risk signals associated with all active or new onboarding cases.

For each of the cards, historical data trend for the last 3 months is also displayed.



Click on a score card to view a list of records that match the appropriate filter condition. You can drill down to the record page of the case, task, or risk signal to view additional details.

View account onboarding cases in the Customer Service Portal

View Customer Success Management onboarding case records or case task records on the Customer Service Management (CSM) portal.

Before you begin

Role required:

- sn_acct_lc_agent
- sn_customerservice_customer.admin
- sn_customerservice_customer_manager
- sn_customerservice.customer

Procedure

1. Use the name and password that you created during the registration process to log in to the Customer Service Portal.
   See Using the Customer Service Portal for details.
2. Select **My Lists** to view the account onboarding cases and case tasks.
   Depending on your user role, you can view the following lists:
   - All Onboarding Cases: Available for users with sn_acct_lc_agent, sn_customerservice_customer.admin, and sn_customerservice_customer_manager roles. All onboarding cases related to the account are displayed under the My Lists section.
   - My Onboarding Cases: Available for users with sn_acct_lc_agent, sn_customerservice_customer.admin, sn_customerservice_customer_manager, and sn_customerservice.customer roles.
   - My Onboarding Case Tasks: Available for users with sn_acct_lc_agent, sn_customerservice_customer.admin, sn_customerservice_customer_manager, and sn_customerservice.customer roles.

   Note:

   When you search for something on the service portal, the search results are shown in separate **Sources**: Onboarding case and Onboarding Case Tasks.
3. Select the All Onboarding Cases list.
   All the onboarding cases related to the selected account are displayed.

4. Select an onboarding case in the list.

   Note: The Header section for the case and case tasks can be configured and you can add or remove fields as required.

   The following details are displayed for each case.

   - Header section that provides basic information about the case including account name, go-live date, number of days before go-live date, and status of the onboarding case.
   - All the onboarding tasks related to the case. Select the task to view additional information such as status, activities, and any attachments.
   - The left-hand section provides the following details:
     - General instructions: Provides a short description and a detailed case description. Select **View More** to view all the details related to the case.
     - Product information: Shows product information only if the `Customer visible` flag is set to True in the account onboarding case playbook.
     - Shared articles: Shows articles that have been shared with you. Select the article link to view details.
5. Select an onboarding case task in the list.
   The following details are displayed for each case task:
   - Header section that provides information about the case task including case number, parent, or onboarding case with which the task is associated, the account name, and status of the task.
   - The left-hand section provides the following details:
     - General instructions: Provides a short description and a detailed case description. Select **View More** to view all the details related to the case.
     - Shared articles: Shows articles that have been shared with you. Select the article link to view details.
   - All the activities related to the case task are displayed.

Recommended actions available with account onboarding

Use the predefined recommended actions that are available with the base system during the account onboarding process.

Recommended actions are available for the following account onboarding tasks:

- Install Service Exchange for Consumer.
- Service Exchange Consumer Registration & Configuration.
- Data import recommended actions.

Install Service Exchange for Consumer

The following recommendations are available:

- This recommendation guides you through the Service Exchange installation process. To view the instructions:
  - Open the record for this task.
  - Click the **Related Knowledge** tab and click on the link to view the Knowledge Base article.

- Troubleshoot Service Exchange Failed Setup: This is a Guided Decision Tree that can assist you in troubleshooting issues that have occurred while setting up Service Exchange. Answer the queries and click **Next** to continue with the troubleshooting process.
  - Select **Yes** to indicate that you are facing issues onboarding a consumer.
  - Select the error message that appears from the drop down list.
  - Specify whether your Service Exchange version is 1.0.4 or later. If you select **No**, the troubleshooting process ends and you must contact customer support for assistance. If you select **Yes**, you will see further information on how to troubleshoot the issue.
- Assigned to Field Recommendation: Click **Assign** to assign the recommended user and auto populate the Assigned to field in the Service Exchange installation task.
- Contact Recommendation: Click **Assign** to assign the recommended contact and auto populate the Contact field in the Service Exchange installation task.

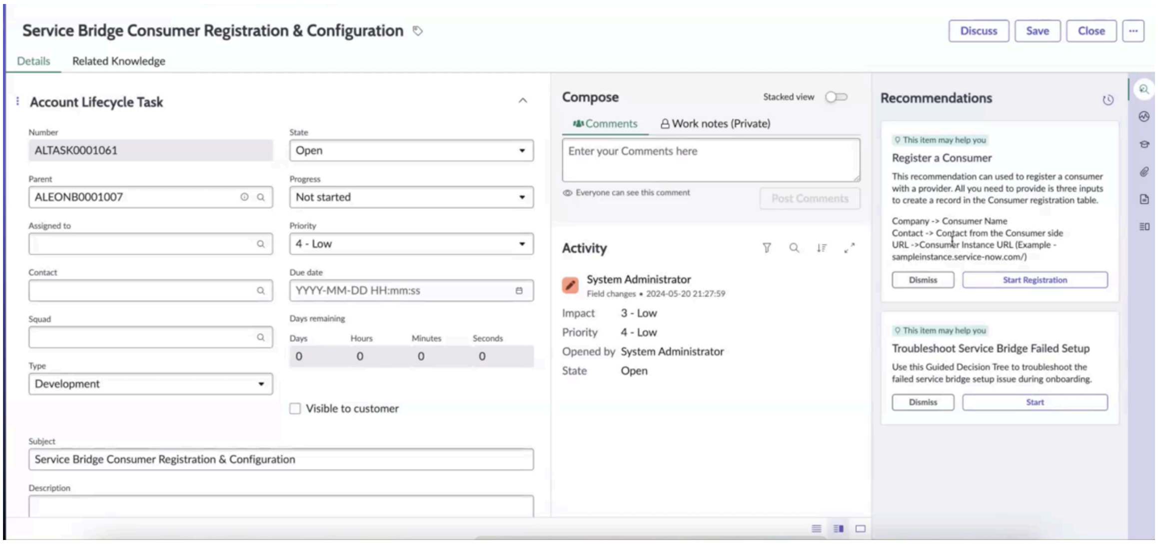
Depending on your selection, you will see instructions on how to resolve the issue. Click on the Knowledge Base article to view additional information about the error. After the error has been resolved, click **End Troubleshooting**.

Service Exchange Consumer Registration & Configuration

The following recommendations are available:

- Register a Consumer: This recommendation provides instructions on how a consumer can register with a Service Exchange provider during the account onboarding process.
  - Click **Start Registration**.
  - Specify the Account Name (the consumer) being registered, and the customer contact.
  - Enter the URL for the consumer's ServiceNow instance.
  - Click **Register**. The consumer record is created in the registration table and the registration process is initiated. The registration process is seamless without any interruption to the account onboarding process.
- Troubleshoot Service Exchange Failed Setup: This is a Guided Decision Tree that can assist you in troubleshooting issues that have occurred while setting up Service Exchange. Answer the queries and click **Next** to continue with the troubleshooting process.
  - Select **Yes** to indicate that you are facing issues onboarding a consumer.
  - Select the error message that appears from the drop down list.
  - Specify whether your Service Exchange version is 1.0.4 or later. If you select **No**, the troubleshooting process ends and you must contact customer support for assistance. If you select **Yes**, you will see further information on how to troubleshoot the issue.

  The following image shows the recommended actions and troubleshooting tips for the Service Exchange Consumer Registration & Configuration task. To initiate the registration process, click **Start Registration** and follow the guided flow to register the consumer.



- Assigned to Field Recommendation: Click **Assign** to assign the recommended user and auto populate the Assigned to field in the Service Exchange Consumer Registration & Configuration task.

Depending on your selection, you will see instructions on how to resolve the issue. Click on the Knowledge Base article to view additional information about the error. After the error has been resolved, click **End Troubleshooting**.

Data import recommended actions

The following recommended actions are available for the data import task:

- Data Import Task Guide: Provides step by step instructions on how to import and validate data.
- Assigned to Field Recommendation: Click **Assign** to assign the recommended user and auto populate the Assigned to field in the Data Import task.
- Troubleshoot Data Import Failure: This is a Guided Decision Tree that can assist you in troubleshooting the data import process. Answer the queries and click **Next** to continue with the troubleshooting process.
    - Select **Yes** to indicate that you are facing issues while importing data.
    - Select the issue from the drop down list.

Depending on your selection, you will see instructions on how to resolve the issue. After the error has been resolved, click **End Troubleshooting**.

Create a success play for account onboarding

Use this option to create a success play for successfully completing an account onboarding journey.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Navigate to the **Account Onboarding Cases** > **All**.
3. Click **New**.

4. In the Create New Account Onboarding Case page, select the customer account that is to be onboarded and click **Continue**.
5. Click **Create success play**.
6. Select **Onboarding** in the Category drop down field and click **Continue**
7. Select **Onboarding Case** subcategory and select the **Initiate a new onboarding journey** activity.
8. Select the customer account, enter a description and short description, select the products, and click **Finish**.
   The success play is launched and new onboarding journey is initiated for this account.

Related items component in account onboarding case page

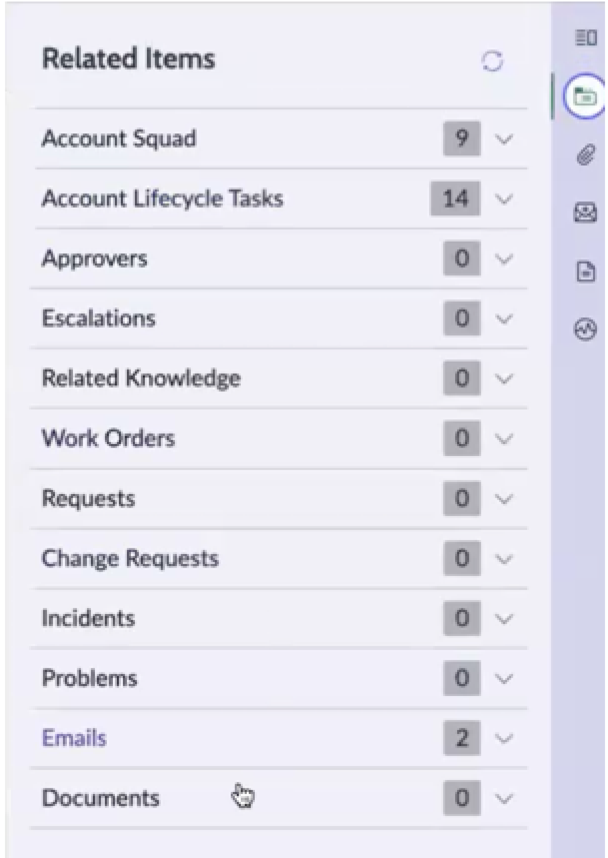
The related items component provides access to related list items associated with your account onboarding case.

The related items component uses an expandable accordion format. You can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

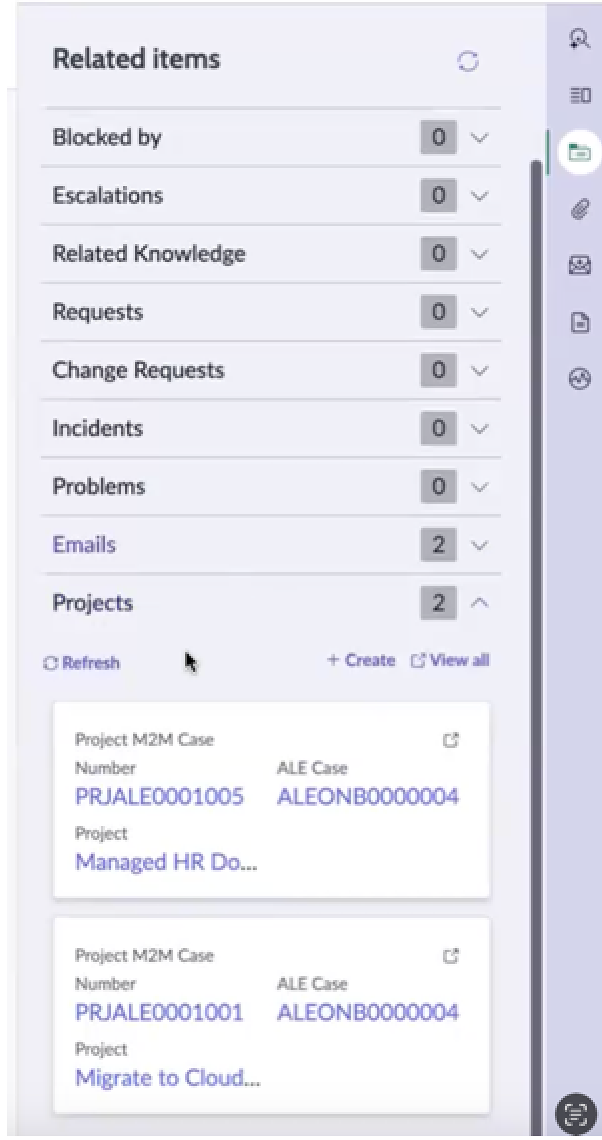
Several related items including account squad, account lifecycle tasks, emails, documents, and projects are displayed. Related items include the following actions:

- Create: opens a blank record in a sub tab that you can use to create a new item.
- View all: opens a list of records in a sub tab.
- Show more: is displayed for lists that have more than five items.

Documents: This related item component allows you to create and manage documents efficiently. The Documents related item is displayed only if you have installed the `com.snc.platform_document_management` plugin.



Projects: Strategic Portfolio Management enables you to use digital transformation to drive more customer value faster. If the Strategic Portfolio Management has been installed, you can see the Projects item on the Related Items list as shown below:



When you create a project for your account onboarding case, the case is mapped to the project table.

Account onboarding Knowledge Base

Several Knowledge Base articles are provided for account onboarding.

Navigate to **All** > **Knowledge** > **Administration** > **Knowledge Bases** and click **Account Lifecycle Events**. The following knowledge base articles are available:

- How to create a Data Validation Assist record: This article provides instructions on how to create a Data Validation Assist record that can be used to automate the validation process during the Data import stage.
- How to configure the trigger of the onboarding case & the playbook: This article provides instructions on how to configure the trigger for the account onboarding case and the playbook.
- How to create remote choice definition in Service Exchange for Providers: This article describes how as a provider, you can define remote choice fields that will allow consumers to retrieve choice data from their instances in real time.
- How to create remote records producer in a remote catalog in Service Exchange for Providers: This article describes how to create remote record producers as part of creating a remote catalog in the Service Exchange for Providers application.

- How to create a remote task to sync data: This article describes how you can create remote tasks to sync data between different ServiceNow® instances.
- How to create an Activity Definition: This article describes lists the steps required to create an activity definition and add it to the account onboarding playbook.
- How to attach KB to the related Knowledge tab of any ALE Task: This article describes how to automatically attach a knowledge article to the Related Knowledge tab of any account onboarding task.
- How to complete the Data Import Task: This article provides step-by-step instructions on how to complete your data import task successfully.
- Account Lifecycle Events PAD Activities Overview: This article provides an overview of the nine Playbooks activity definitions used to create the activities inside the Account Lifecycle Events (ALE) playbook.
- A Consumer's Guide to Installing Service Bridge and Registering with Providers: This article provides instructions on how to configure the Service Bridge application on the consumer instance and how consumers can register their instances with a provider.
- How to configure Account Lifecycle Events data import task: This article describes the steps required to configure the Account Lifecycle Events data import tasks so that the agents can successfully gather and upload the information needed to onboard the account.

Note: All customers can view these Knowledge Base articles. If you want to restrict access to an article, navigate to the article and in the Cannot Read field, select the user role who will not be able to access the article.

Customer success

Define and track objectives, outcomes, milestones, and plans to achieve shared goals.

Explore Learn about the customer success solution	Configure Configure the customer success objects
Use View detailed information and status about the engagement lifecycle	Reference Get information about the data model and installed components

Exploring customer success

Learn how your organization can use the customer success solution to engage with your customers, mitigate risks by running success plays, and identify opportunities for expansion and renewals.

With the customer success solution, technology and telecommunications service providers can create a relationship focused strategy that helps maximize achievements, drives engagements, and delivers actionable results. Customer success managers can define and track success objectives, and use documented success plans to ensure that value is being delivered. By driving achievements in both value and success, customer success can:

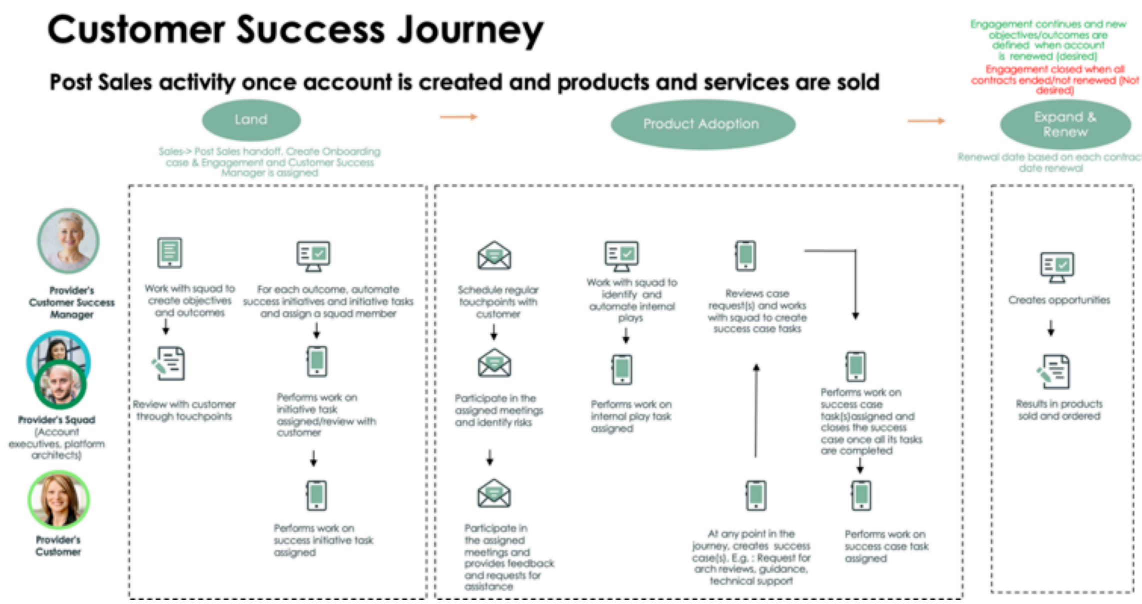
- Inspire customer loyalty and retention, not only ensuring adoption but also customer mastery of its products.
- Increase chance of renewals by providing sales and account teams information from various gathered signals.
- Decrease customer churn by identifying and mitigating risks and issues.
- Boost lifetime customer value and annual recurring revenue.

Customer success workflow

Customer success includes the following:

- Customer success data model and records
- Customer success portfolio overview
- Health and risk framework
- Risk portfolio overview
- Engagement workspace pages
- Process based experience with playbooks
- Success play launcher that can be used to create automated or manual activities
- Customer success playbooks
- Success blueprint
- Scheduled touchpoints and touchpoint planner

The diagram below shows the various steps involved in the customer success journey.



Health framework

Define key business and operational indicators and their impact on the overall health of an engagement.

Customer success managers can use the health score to assess the status of an engagement, whether it is stable or in decline. They can use key business and operational indicators to define and measure performance at a global level or for specific engagements based on contractual needs. The health score of an engagement can provide insights and help customer success managers to identify trends and take action if required.

The health score can be calculated using different metrics like CSAT score, product usage, and so on. For example, you can calculate the health score for an engagement using the following metrics:

Metric	Weight
CSAT score	20%
Product usage	30%
License utilization	10%
Number of promoters (NPS score)	20%
Number of orders created for product X	20%

The health score for the engagement is the total weight of all these metrics. See Setup the engagement health definition for details on how to configure the metrics to calculate the health score.

You can view the health score for a specific engagement or all engagements on the Success portfolio dashboard.

Risk framework

Centralize, track, and monitor relational risks and reduce customer churn. Identify risk signals and create repeatable remediation plans.

Risks can affect the health of an engagement and jeopardize chances of expansion or renewal. Customer success managers can use the risk signals to record and manage risks tied to an engagement and take appropriate actions. Risk signals can provide insights and help customer success managers identify trends and evaluate them.

Risk signals can be:

- Created manually. See Create a risk signal.
- Generated automatically when a threshold value is breached or a specific condition is met. See Setup the engagement risk definition.

The following list shows a few sample use cases when risk signals are generated:

- CSAT survey results declined by X% for a product
- NPS dropped to 7
- License utilization is less than 50%
- Number of P1 cases for a product / account increased by x%
- Success outcome deadline missed
- The Net ACV for the opportunity is reduced by X%

Customer success agents can monitor risk signals on the Active risk signals page. See Risk portfolio dashboard for details.

Success blueprint template

Use the success blueprint template to create a template with predefined objectives and outcomes for a specific product. This feature helps streamline the process of associating objectives and outcomes for a product when an engagement is created.

With the success blueprint template, the customer success managers can ensure that the right objectives and outcomes are being achieved for engagements in their portfolio. They can:

- Create common success objectives and outcomes, and tailor them to meet customer needs.
- Organize objectives, outcomes and initiatives with a timeline view for easier access.

The template provides a standardized approach to creating objectives and outcomes and reduces manual overhead. It also provides guidelines for customer success managers to discuss and identify objectives that are important for the customers. See Create a success blueprint template for details.

About Touchpoints

Customer success agents can schedule regular touchpoints during the lifecycle of an engagement to evaluate progress, provide feedback, and offer guidance.

Touchpoints are used to support conversations between providers and enterprise customers at different stages in the engagement lifecycle. Touchpoints help capture and organize both internal and external meeting notes, and ensure that all communication and action items are efficiently tracked and easily accessible for future reference.

Touchpoint user roles

User role	Description
Success Agent	Can create, read, and update touchpoints and meeting records.

User role	Description
Success Customer	Can create and update touchpoints, meeting records, and schedule meetings.

See Touchpoint home page

for more details.

Customer success playbooks

Customer success agents can use playbooks to define planned and unplanned activities, success, and renewal processes.

Playbooks provide step-by-step guidance and include multiple stages and activities that need to be included. Customer success agents can:

- View the playbook stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities and close the playbook.

For more details on the playbook layout and components, see <add link>. The following playbooks are available:

- Success case playbook
- Internal play playbook
- Renewal playbook

Success case playbook

Use the success case playbook as the starting point to define the success processes in your organization. This playbook can contain one or more success case tasks with predefined activities.

The success case playbook consists of three stages:

- Initiate: Create a success case record for an engagement and enter the core information.
- Assist: Create success tasks related to the success case. In this stage, you can define the intended outcome, action plan, and create meetings.
- Close: Close the playbook when all the success tasks have been completed.

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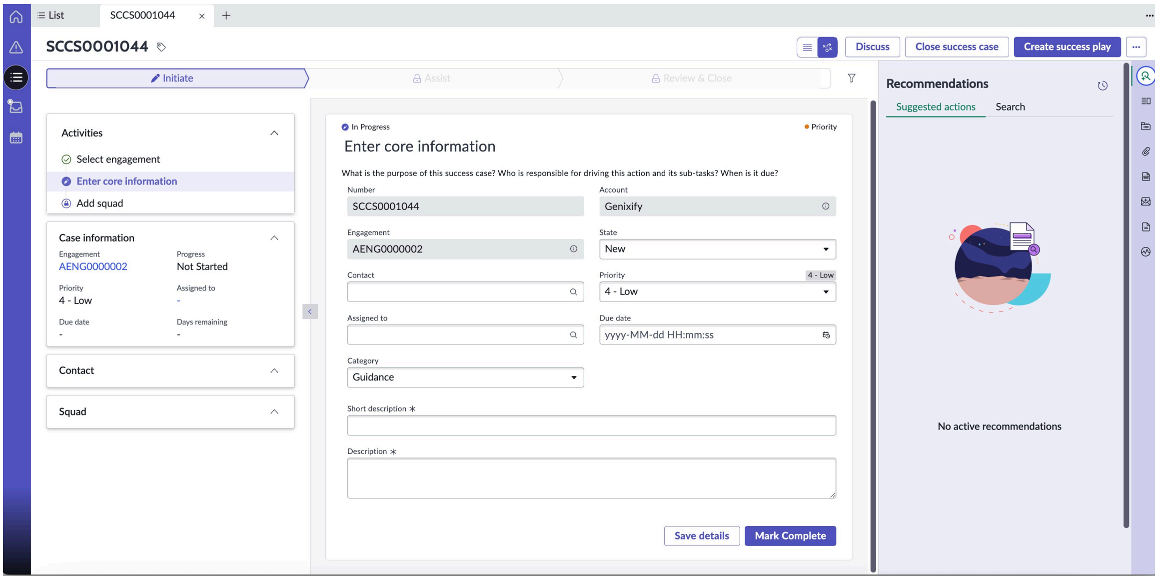


For more details on the playbook layout and the different cards, see Playbook layout and features. For instructions on how to create the success case playbook, see Create a success case playbook.

Internal play playbook

Use the internal play playbook as a starting point to define planned or unplanned activities that the customer does not have access to during the engagement lifecycle. This playbook can contain one or more internal play tasks with predefined activities.

The internal play playbook consists of three stages:

- Initiate: Create an internal play record for an engagement and enter the core information.
- Define the Action Plan: Specify the steps and tasks for this internal play.
- Review & Close: Review and close the playbook when all the internal play tasks have been completed.

For instructions on how to create the internal play playbook, see Create an internal play playbook.

Renewal playbook

Use the renewal playbook to define the account renewal processes in your organization. This playbook is used to drive contract renewals and improve customer retention.

The renewal playbook consists of the following stages:

- Initiate
- Assess Opportunity
- Communicate
- Track Opportunity
- Review & Close

For instructions on how to create the renewal playbook, see Create a renewal playbook.

Configure customer success

After an onboarding case has been created, you can configure and set up customer success by creating engagements, configuring success plays, and setting up the success initiative record.

This section covers the following:

- Create an engagement
- Create a success initiative
- Create an ALE definition record
- Create an ALE choice record
- Create a success play
- Create an internal play playbook
- Create a success case playbook
- Create a renewal playbook
- Define risk signal to solution relationship
- Create a success blueprint template
- Setup the data context engine
- Setup the engagement health definition
- Setup the engagement risk definition
- Integrating with Microsoft Dynamics CRM

Create an engagement

Create an engagement record that centralizes all internal and external activities that are involved in the customer success journey.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

After the account onboarding has been completed, the next step is to create an engagement which will include the customer objectives and outcomes. An engagement acts as an umbrella record and provides internal and external stakeholders with a view of the current and historical state of the customer success journey. It also helps drive actions and workflows that are part of the customer success lifecycle.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Engagements** and click **New**.
3. On the form, fill in the fields.

Engagement form

Field	Description
Number	System generated unique number for the engagement.
Account	Select the account number of the enterprise customer from the list. This is a mandatory field.

Field	Description
Account manager	Main internal stakeholder responsible for the account.
Customer success manager	The primary internal stakeholder who is in charge of driving customer success for the account.
Key customer contact	Main external stakeholder responsible for the account.
Squad	The supporting team members handling the account.
State	State of the engagement record. This can be: ◦ New ◦ Define ◦ In progress ◦ Canceled ◦ Closed
Stage	Current stage of the engagement lifecycle. This can be: ◦ Initial on-boarding ◦ Adoption ◦ Expand ◦ Renew ◦ Lost
Perceived health	Perceived health of the engagement. This can be: ◦ Unknown (this is the default) ◦ Red ◦ Yellow ◦ Green
Initial onboarding	Select the initial account onboarding case associated with this account. This is a mandatory field.
Initial go-live	The customer's initial go-live date.
Renewal date	The renewal date for the customer contract.
AI Health Monitor	If this flag is enabled, the engagement health is monitored by the Monitor engagement health agentic workflow. See Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow for details.
Title	Enter a title for this engagement record. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the engagement record.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this engagement record.
Work notes	Any internal notes regarding this engagement.

4. Click **Save** to create a new engagement record.

What to do next

After you have created the engagement, you can create objectives, outcomes, touchpoints, and risk signals for the customer account associated with this engagement.

Create a success objective

Create a success objective that represents the value of the products sold to the customer.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

A success objective represents that value of one or more products purchased by the customer. Objectives are defined for a specific period and are tied to an engagement. An objective can be broken down into several success outcomes that measure its achievement.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Objectives** and click **New**.
3. On the form, fill in the fields.

Success objective form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the objective is to be related. This is a mandatory field.
Objective owner	The individual responsible for the objective from the provider side.
Sponsor	External contact responsible for the objective.
Products	The sold products that match the objective.
Driver	The driving category reason behind the objective.
State	State of the engagement record. This can be: ◦ New ◦ Define ◦ In progress ◦ Canceled ◦ Closed
Progress	Current progress of this objective. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused

Field	Description
	○ Completed ○ Canceled
Priority	Priority of this objective in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date which the work towards this objective is scheduled to start.
Planned stop	Date which the work towards this objective is scheduled to stop.
Title	Enter a title for this objective. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the objective.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this objective. This is a mandatory field.
Work notes	Any internal notes regarding this objective.

4. Click **Save** to create a new success objective.

Create a success outcome

Create a success outcome that can be used to measure the achievement of a success objective.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

Success outcomes are measurable components of success objectives. Success outcomes are both measurable and actionable and can be monitored either within the ServiceNow AI Platform or through 3rd party integration tools.

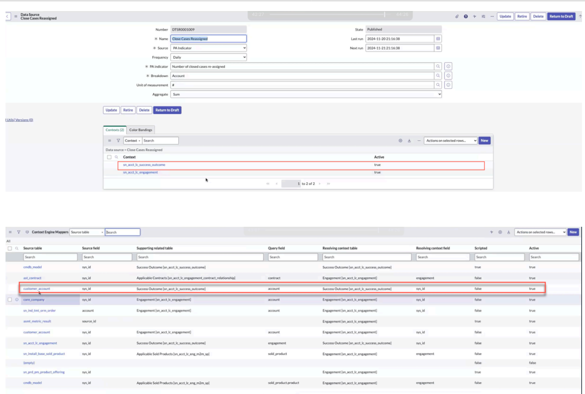
Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Outcomes** and click **New**.
3. On the form, fill in the fields.

Success outcome form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.

Field	Description
Success objective	Select the success objective with which this outcome should be associated. This is a mandatory field.
Owner	The internal person responsible for tracking the achievement of this outcome.
State	State of the success outcome. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this outcome. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this outcome in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date which the work towards this outcome is scheduled to start.
Planned stop	Date which the work towards this outcome is scheduled to stop.
Title	Enter a title for this outcome. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the outcome.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this outcome. This is a mandatory field.
Work notes	Any internal notes regarding this outcome.
Unit	Unit of measurement of this success outcome.
Tracking method	Tracking method for this outcome.

Field	Description
	○ Manual: Enter the measurement unit and values manually. ○ Metric: Select a metric from the list. The values are populated automatically if the data source and context engine mapping has been configured. **Note:** The metric values are automatically populated if: ▪ The context for the data source must be configured to point to the success outcome table. See Define the data source. ▪ The source and the resolving context tables must be correctly configured. See Set up the context engine mapper.
	
Base value	Starting point or base value for this outcome.
Target value	Target value that is to be achieved.
Current value	Current value of the success outcome.

4. Click **Save** to create a new success outcome.

Create a success initiative

Create a success initiative with a planned set of internal or external tasks to support a success outcome.

Before you begin

Role required: sn_acct_lc.ale_success_agent, sn_acct_lc.ale_success_customer

About this task

Success initiatives are a set of planned activities or tasks that a provider and a customer must complete to achieve a success outcome. A success initiative can include one or more tasks that can be internal or external and can be defined with the Create Success Initiative playbook.

Note: The Create Success Initiative playbook has a set of predefined stages and fields. You can add or modify these stages using Playbooks. See Playbooks for details.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and click the **List** icon.
2. Navigate to the **Customer Success** > **All Initiatives** and click **New** to launch the playbook.

3. In the Initial Setup page, select the **Success Outcome** with this initiative is to be associated.
4. Click **Continue** to move to the next tab.
   The success initiative record is created.
5. In the Plan the Plan section, enter the core information for this initiative as follows.

Success outcome	Select the success outcome associated with this initiative.
Contact	The customer contact responsible for this initiative.
Assigned to	The internal team member responsible for this initiative.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this initiative. This can be: ◦ General ◦ Strategic planning ◦ Architecture and design ◦ Adoption ◦ Technical guidance
State	State of the initiative. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this initiative. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this initiative in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date on which this initiative is due.
Subject	Enter a subject for this initiative.
Description	Enter a description for this initiative.

6. Click **Mark Complete**.
7. In the Collab and Complete step, click **Create Task** to automatically create a sample success task or click **Skip** to skip this step.
8. In the Summarize and Close step, enter the following details.
   - Closure code: Select the reason for which the record is being closed. This can be:
     - Achieved
     - Partially achieved
     - Missed
     - Canceled
   - Close notes: Provide a description on which this initiative is being closed.
9. Click **Mark Complete** to complete this task.

> **Note:** You can use response templates to provide quick responses, or copy and paste relevant information from a case. Click the **Response template** icon and select the response template you want to use. For more details on response templates, see Response templates.

What to do next

You can perform the following actions:

- Discuss: Click **Discuss** to start a sidebar discussion about this initiative. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this initiative. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Assign to me: Select this option to reassign this initiative to yourself.
- Close initiative: Once the initiative has been completed and the Closure code is set to **Achieved**, you can close this initiative.
- Create success play: Select this option to create a success play. See Create a success play for details.
- Email: Open the Activity stream and select **Email** from the More drop down list. Enter the required details and click **Send email**.

> **Note:** You can send emails only to the team members associated with the account.

Close or cancel a success initiative

You can close or cancel a success initiative and all the related tasks.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and click the **List** icon.
2. Navigate to the **Customer Success** > **All Initiatives** and open the success initiatives you want to cancel.
3. Click the **Record details** to view the success initiative form.
4. Depending on your requirement, change the State to **Canceled** or **Closed**.
   The Closure code is automatically updated to reflect the State change.

5. Ensure that all the mandatory fields are filled out and click **Save**.
6. Click **Yes** in the confirmation window to continue.
   The success initiative along with all associated child tasks will be canceled or closed and the Progress is set to **Finished**.

   Note: Before you close a success initiative, you must close or cancel all the associated child tasks. If an associated child task is still open, a warning message is displayed. You must first close or cancel the child tasks and then proceed with closing the success initiative.

Create a touchpoint

Create a touchpoint to capture and support conversations between providers and customers during the engagement lifecycle.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

During the lifecycle of an engagement, providers and customers may have frequent conversations, sync-up meetings, reviews, and so on. A touchpoint is meant to capture and support these discussions and share information among the various stakeholders. Additionally, customers can raise touchpoints to their provider about any number of topics, ask for support, or request details about a given objective.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to **Customer Success** > **All Engagements**.
3. Open the engagement for which you want to add touchpoints.
4. Select **Touchpoint** from the drop down list.
5. On the form, fill in the fields.

Touchpoint form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the touchpoint is related. This is a mandatory field.
Channel	The channel used for communication. This can be: ◦ Web ◦ Phone ◦ Email ◦ Chat ◦ Social ◦ Community

Field	Description
	○ Alert ○ Virtual Agent
Contact	The key customer contact for this touchpoint.
Assigned to	The key internal team member handling this touchpoint.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this touchpoint. This can be: ○ General conversation ○ Value and adoption ○ Expansion opportunities ○ Renewal support
State	State of the touchpoint. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this touchpoint. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this touchpoint in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Due date	Date by which the touchpoint should be completed.
Product	The product to which this touchpoint is related. Select the checkbox to indicate if the touchpoint is related to a specific product that has been sold.
Subject	Enter the subject for this touchpoint. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the touchpoint.

Field	Description
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this touchpoint. This is a mandatory field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that needs to be provided to the customer.

Note: The `Meeting date` and `Meeting type` fields have been deprecated from the Yokohama release.

6. Click **Save** to create a new touchpoint.

Create a risk signal

Create a risk signal to identify any risk or issues that can occur during the engagement lifecycle.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

Risk Signals and Issues are used to record and manage risks associated with an engagement so that appropriate actions can be taken. Risks may have different degrees of severity and need to be evaluated before they are addressed. For example, an external system may flag missing information to the customer success manager who may address the issue using an internal play. If the risk is low in impact, the customer success manager may decide to accept the risk and proceed with the engagement.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Risk Signal and Issue Records** and click **New**.
3. On the form, fill in the fields.

Risk signal form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the risk signal is related. This is a mandatory field.
Reported by	The internal team member who reported this risk signal.
Assigned to	The key internal team member responsible for handling this risk signal.
Squad	The team supporting this account for achieving both value and success.
State	State of the risk signal. This can be:

Field	Description
	○ New ○ Active ○ Canceled ○ Closed
Priority	Priority of this risk signal in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Due date	Date by which the risk signal should be addressed.
Risk or issue	Indicate whether this is a risk or an issue.
Category	This field is set to **Health declined** by default. It is applicable for risks and risk occurrences created using the Monitor engagement health agentic workflow.
Short description	Enter a short description for this risk signal. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the risk signal.
Watch notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this risk signal. This is a mandatory field.
Work notes	Any internal notes regarding this risk signal.
Creation method	The origin of the risk signal. This can be: ○ AI generated ○ Manual ○ Automated ○ Integration
Table	Select the table used by the risk signal record.
Source record	Select the source record from which the risk signal originated.
Scope	Indicate whether this risk signal is related to customer success or onboarding. This can be: ○ Onboarding ○ Adoption ○ Expansion ○ Renewal
Probability	The probability that this risk may occur. This can be:

Field	Description
	○ Very high ○ High ○ Moderate ○ Low ○ Very low This is a mandatory field.
Contracts impacted	The contracts impacted by this risk or issue.
Products impacted	The products impacted by this risk or issue.
Engagement risk definition	Select the applicable engagement risk definition. See Setup the engagement risk definition for details.

4. Click **Save** to create a new risk signal.

Create an ALE definition record

Create an ALE definition record to set up categories and sub categories for success play workflows.

Before you begin

- The subflow used to trigger the success workflow must be defined.
- Role required: sn_acct_lc.ale_success_play_admin

About this task

Use the ALE definition record to specify categories that can be used to launch success play workflows that can create records and trigger playbooks automatically.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **ALE Definition** and click **New**.
3. On the form, fill in the fields.

ALE definition form

Field	Description
Flow	Select the subflow that should be triggered by this ALE definition record. This subflow must be defined and configured using Flow Designer.
Category	Select the category for the success play.
Sub category	Based on the category you select, the related sub categories are displayed. Select the sub category from the drop down list.
State	Select the state for this ALE definition record. This can be: ○ Draft ○ Published

Field	Description
	○ Closed ○ Canceled
Order	Specify the order in which the categories should appear in the workflow launcher pages.
Title	Enter a title for the workflow launcher item.
Description	Enter a description to specify the purpose of this workflow launcher item.

4. Set the state of this record to **Published** and click **Save**.
   The category defined here can be used while creating the success play.

Create an ALE choice record

Create an ALE choice record to set up the categories for the ALE definition record.

Before you begin
Role required: sn_ti_core.write

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **ALE Choice** and click **New**.
3. Enter a name for the ALE choice.
4. Select the category as **ALE definition record** from the list.
5. Select the dependent category from the list.
6. Enter a description for this record and click **Save**.
   The ALE choice record you create will be available as sub categories when you create success plays.

Create a success play

Use this option to create a success play to create automated actions.

Before you begin
Role required: sn_acct_lc.ale_success_agent

About this task
With success plays, you can use Flow Designer and playbooks to quickly create actions that need to be executed during the engagement lifecycle. These actions can be manual or completely automated. This section describes how to create a success play from the engagement record page. You can also launch the success play workflow from any of the following pages:

- Success initiative
- Success objective
- Touchpoints
- Success case
- Internal play
- Risk signal

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Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the Success landing page, click **View engagement** and then click **Create success play**.
3. Select a category that aligns with your goal.
   The sub categories displayed are filtered based on the category you select here.
4. Select a sub category from the list and select the activity that must be completed to achieve your goal.
5. Click **Next** to continue.
   Based on your previous selections, you are prompted for additional details in the next page.
6. Click **Finish**.
   You will see a notification indicating that the success play has been created. When the tasks are completed, the work notes are updated indicating that it is complete.

   > **Note:** When you start creating a success play, a success launcher notifier record is created to track the status of the success play. To view this record, navigate to the **All** menu and enter `sn_acct_lc_success_notifier_launcher.list` in the Search filter. You can view the status in the Success Launcher Notifiers page.

Define subflows for success plays

Before you create a success play, you must define a subflow and add it to the Definition Records table.

For instructions on creating a subflow, see Create a flow, subflow, or action in Workflow Studio. After you have created the subflow, follow these steps to add it to the Definition Records table.

1. Navigate to **All** and enter `sn_acct_lc_definition_record.list` in the Search filter.
2. In the Definition Records page, click **New**.
3. In the form, fill the fields.

Definition record form

Field	Description
Flow	Select the subflow you have created.
Category	Select the category with which the subflow is to be associated.
State	The state of the definition record. This can be: ◦ Draft ◦ Published ◦ Closed ◦ Cancelled
Title	Enter a title for this definition record.
Description	Enter a description for this definition record.

4. Click **Submit**.

Create an internal play playbook

Create an internal play playbook to define planned or unplanned activities that the customer does not have access to during the engagement lifecycle. This playbook is your starting point to define any internal processes required by your organization.

Before you begin
Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Internal Plays** and click **New**.
3. In the *Initiate* phase, you can perform the following activities:
   - Select engagement: In the Number field, a unique number for the internal play is auto populated. In the Engagement field, select the engagement for which the internal play playbook is being created and click **Continue**. An internal play playbook record is created.
   - Enter core information: In this page, enter the details for the success case record and click **Mark Complete** to move to the next activity. See Create an internal play playbook record for a detailed description of this form.
   - Add squad: Select one or more squad members who will involved in the internal play and the related activities and click **Mark Complete** to move to the next stage.
4. In the *Assist* phase, you can perform the following activities:
   - Formulate the action steps: Specify the action plan for this playbook. This will appear in the worknote. Click **Send and continue** to proceed to the next activity. The action plan will appear as work in the Activity Stream section of the playbook.
   - Related work: Click **Create task** to create an internal play task. See Create an internal play task for a detailed description of this form.

     Note: Internal play tasks that are in New, In-progress, or Paused state are displayed in this page. To continue to the next activity, update the *State* to Complete or Canceled. After all the internal play tasks have been closed or canceled, click **Mark Complete** to continue with the next activity.
5. In the Review & Close, you can perform the following activities:
   - Communicate the final outcome: Enter a comment to describe the final outcome for this playbook. Click **Send and continue** to proceed to the next activity.
   - Close record: Select the Closure code from the drop down list and Close notes for this playbook and click **Mark Complete**.
6. Click **Close** after all the activities have been completed.
   The internal play playbook State is set **Closed** and Progress is set to **Completed**.

   Note: If after creating the internal play playbook, you close or cancel the playbook, all pending activities and lanes are automatically canceled and playbook State is set to Canceled.

Create an internal play playbook record

Create an internal play to define a planned or unplanned activity during the engagement lifecycle.

Before you begin
Role required: sn_acct_lc.ale_success_agent

About this task

An internal play is used to monitor internal activities that the customer does not have access to during the engagement lifecycle. For example, the renewal phase of a contract can be triggered 90-120 days before it is due to expire. This can launch a series of planned internal actions that can increase the chances of the contract being renewed or extended. An internal play can contain one or more sub-tasks and follows a playbook with predefined activities.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Internal Plays** and click **New**.
3. On the form, fill in the fields.

Internal play form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	The engagement record to which the internal play is related.
Assigned to	The key internal team member responsible for this internal play.
Squad	The team supporting this account for achieving both value and success.
State	State of the internal play. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this internal play. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this internal play in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the internal play should be completed.

Field	Description
Short description	Enter a short description for this internal play. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the internal play.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this internal play. This is a mandatory field.
Work notes	Any notes to internal team members regarding this internal play.

4. Click **Save** to create a new internal play.

What to do next

- Create internal play tasks to define tasks that should be performed when an internal play is launched. See Create an internal play task
- Click **Discuss** to start a sidebar discussion about this internal play. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this internal play. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Email: Open the Activity stream and select **Email** from the More drop down list. Enter the required details and click **Send email**.

  Note: You can send emails only to the team members associated with the account.

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Create an internal play task

Create an internal play task that must be performed when the internal play is launched. An internal play task must have a clear purpose and specifies the activity that must be performed. It is not visible to customers.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Internal Plays**.
3. Open an internal play, navigate to the Internal Play Tasks tab and click **New**
4. On the form, fill in the fields.

Internal play form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.

Field	Description
Engagement	Select the engagement record to which the internal play task is related.
Internal play	The internal play with which this task is to be associated is displayed. You can select a different internal play from the drop down list.
Assigned to	The key internal team member responsible for this internal play task.
Squad	The team supporting this account for achieving both value and success.
State	State of the internal play task. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this internal play task. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this internal play task in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the internal play task should be completed.
Short description	Enter a short description for this internal play task. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the internal play task.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this internal play task. This is a mandatory field.

Field	Description
Work notes	Any notes to internal team members regarding this internal play.

5. Click **Save** to create a new internal play task.

What to do next

- Click **Discuss** to start a sidebar discussion about this internal play task. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this initiative. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Create success play: See Create a success play.

Close or cancel an internal play

You can close or cancel an internal play and all the related tasks.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and click the **List** icon.
2. Navigate to the **Customer Success** > **All Internal Plays** and open the internal play you want to cancel.
3. Click the **Record details** to view the internal play record form.
4. Depending on your requirement, change the State to **Canceled** or **Closed**.
   The Closure code is automatically updated to reflect the State change.
5. Ensure that all the mandatory fields are filled out and click **Save**.
6. Click **Yes** in the confirmation window to continue.
   The internal play along with all associated child internal play tasks will be canceled or closed and the Progress is set to **Finished**.

   Note:

   - Before you close an internal play, you must ensure that no associated child tasks are open. If an associated child task is still open, a warning message is displayed. You must first close or cancel the child tasks and then proceed with closing the internal play task.
   - When you try to **Cancel** an internal play, you will see a confirmation message indicating that all child tasks will be canceled. Click **Yes** to continue and cancel the internal play.

Create a success case playbook

Create a success case playbook to define planned and unplanned activities that are required to support an engagement. The success case playbook is your starting point to configure the success processes required in your organization.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Success Cases** and click **New**.
3. In the `Initiate` phase, you can perform the following activities:
    - Select engagement: In the Number field, a unique number for the success case is auto populated. In the Engagement field, select the engagement for which the success case is being created and click **Continue**. A success case record is created.
    - Enter core information: In this page, enter the details for the success case record and click **Mark Complete** to move to the next activity. See Create a success case record for a detailed description of this form.
    - Add squad: Select one or more squad members who will involved in the success case and the related activities and click **Mark Complete** to move to the next stage.
4. In the `Assist` phase, you can perform the following activities:
    - Communicate the intended outcome: Enter a comment to describe the expected outcome for this playbook. Click **Send and continue** to proceed to the next activity.
    - Define the action plan: Specify the action plan for this playbook. This will appear in the worknote. Click **Send and continue** to proceed to the next activity.
    - Related meeting: Create a meeting for this success case. See <Create meeting> for details.

      Note: Meetings that are in a Draft or Scheduled state displayed in the Related meeting page. To continue to the next activity, update the State to Complete or Canceled. After all meetings have been closed or canceled, you can click **Mark Complete** to continue with the next activity.

    - Related work: Click **Create Task** to create a success case task. See Create a success case task for a detailed description of this form.

      Note: Success case tasks that are in a New, In-progress, or Paused state are displayed in the Related meeting page. To continue to the next activity, update the State to Complete or Canceled. After all success case tasks have been closed or canceled, click **Mark Complete** to continue with the next activity.

5. In the Review & Close phase, you can perform the following activities:
    - Communicate the final outcome: Enter a comment to describe the final outcome for this playbook. Click **Send and continue** to proceed to the next activity.
    - Close record: Select the Closure code from the drop down list and Close notes for this playbook and click **Mark Complete**.
6. When all the activities have been completed, you can click **Close success case**.
   The success case record State is set **Closed** and Progress is set to **Completed**.

   Note: If after creating the success case playbook, you close or cancel the playbook, all pending activities and lanes are automatically canceled and playbook State is set to Canceled.

Create a success case record

Create a success case to specify an unplanned activity required to support an engagement. Success cases can be monitored by the customer during the engagement lifecycle.

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

A success case is a typically an unplanned set of actions that a provider may take to support a customer touchpoint, stakeholder request, or an engagement activity. A success case may not be associated with an objective or outcome, but can be based on the nature of the success case and why it was created. A success case is a form of case type with its own case tasks.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Success Cases** and click **New**.
3. On the form, fill in the fields.

Success case form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the success case is related. This is a mandatory field.
Contact	The key customer contact for this success case.
Assigned to	The key internal team member handling this success case.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this success case. This can be: ◦ Guidance ◦ Architecture review ◦ Demos and POCs ◦ Training
State	State of the success case. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this success case. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused

Field	Description
	◦ Completed ◦ Canceled
Priority	Priority of this success case in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the success case should be completed.
Product	The product associated with the success case.
Service definition	Service definitions work with case types to provide different types of service requests. With this feature, you can create connections between products and services and the case types that support those services.
Short description	Enter a short description for this success case. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the success case.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this success case. This is a mandatory field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that needs to be provided to the customer.

4. Click **Save** to create a new success case.

   Note: You can use response templates to provide quick responses, or copy and paste relevant information from a case. Click the **Response template** icon and select the response template you want to use. For more details on response templates, see Response templates.

What to do next

- Click **Discuss** to start a sidebar discussion about this success case. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this initiative. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Create success play: See Create a success play.

Create a success case task

Create a success case task to define a planned action that a provider or customer must complete in support of a success case. A success case task must be clearly defined and can be visible to internal stakeholders or external customers.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Success Cases**.
3. Open an success case, navigate to the Success Tasks tab and click **New**
4. On the form, fill in the fields.

Success case form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Parent	The parent success case with which this task is to be associated is displayed. You can select a different success case task from the drop down list.
Contact	The key customer contact for this success case task.
Assigned to	The key internal team member handling this success case task.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this success case task. This can be: ◦ Workshops and meetings ◦ Design reviews ◦ Product training ◦ Professional services
State	State of the success case task. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this success case task. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this success case task in comparison to others. This can be:

Field	Description
	◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the success case task should be completed.
Visible to customer	Select this checkbox if the success case task should be visible to customers.
Subject	Enter the subject or the goal for this success case task. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the success case.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this success case. This is a mandatory field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that needs to be provided to the customer. This information will be visible to the customer.

5. Click **Save** to create a new success case.

What to do next

- Click **Discuss** to start a sidebar discussion about this success case task. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this initiative. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Create success play: See Create a success play.

Close or cancel a success case

You can close or cancel a success case and all the related tasks.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and click the **List** icon.
2. Navigate to the **Customer Success** > **All Success Cases** and open the success case you want to cancel.
3. Click the **Record details** to view the success case form.
4. Depending on your requirement, change the State to **Canceled** or **Closed**.
   The Closure code is automatically updated to reflect the State change.
5. Ensure that all the mandatory fields are filled out and click **Save**.

6. Click **Yes** in the confirmation window to continue.
   The success case along with all associated child success case tasks will be canceled or closed and the Progress is set to **Finished**.

   Note: Before you close a success case, you must close or cancel all the associated child tasks. If an associated child task is still open, a warning message is displayed. You must first close or cancel the child tasks and then proceed with closing the success case.

Create a renewal playbook

Create a renewal playbook to define processes to simplify contract renewals and identify expansion opportunities.

Before you begin
Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Select **Customer Success** > **All Engagements** and click on an engagement in the list.
3. Click **Create success play**.
4. Select **Success Support** from the Category drop down list.
5. In the sub-category section, select **Simple renewal play** and click **Next**.
6. Specify the Due Date and select the user in the Assigned to field and click **Finish**.
   You will see a confirmation message and the renewal playbook record is created.
7. Select **Customer Success** > **All Internal Plays** to view the newly created renewal playbook.
8. Click on the renewal playbook you have created to view the first stage of the playbook.
9. In the `Initiate` phase, you can perform the following activities:
   - Enter core information: Select the contract with which this renewal playbook is to be associated and select `Expansion and Renewal Support` in the Category field. Enter information in the other mandatory fields and click **Mark Complete** to move to the next activity.
   - Add squad: Select one or more squad members who will involved in the renewal playbook activities and click **Mark Complete** to move to the next stage.
10. In the `Assess Opportunities` phase, you can perform the following activities:
    - View contract record: The details of the contract you have selected are displayed. Click **Open record** to verify the contract details. Click **Mark read** to proceed to the next activity.
    - Assess engagement: Enter any actions that need to be performed as part of this playbook and click **Send and continue** to proceed to the next activity. The actions you specify will appear as worknotes in the Activity stream.
11. In the `Communicate` phase, you can perform the following activities:

- Communicate renewal opportunity: In this activity, you can send an email request to the contracts approver or business owner to renew the contract. A sample email template is provided, you can modify this as required and click **Send Email**.

  Note:

  - This activity creates an internal play task which is displayed as a worknote in the Activity Stream. Click on the internal play task link to view the record. When you click **Send Email**, the status of this task is set to `Closed`, and the Closure code and Close notes fields are updated to indicate that the email has been sent.
  - If you click **Skip email**, the status of the internal play task is set to `Canceled` and the internal play task is canceled.

- Create opportunity: In this activity, you can create a new opportunity for your contract. This activity creates an internal play task. Update the task details as required to move to the next stage. Click **Open record** to view the internal play task. Review the opportunity details, update the status to Closed or Canceled, and click **Close** this activity and move on to the next stage.

12. In the `Track Opportunity` phase, review the contract details.
    Click **Open record** to make changes if necessary or click **Mark read** to proceed to the next stage.
13. In the Review & Close, you can perform the following activities:
    - Communicate the final outcome of the renewal: Enter details to describe the final renewal outcome and click **Send and continue** to proceed to the next activity. The final outcome information is displayed as a worknote in the Activity stream.
    - Close record: Select the Closure code from the drop down list and Close notes for this playbook and click **Mark Complete**.
14. Click **Close** when all the activities have been completed.
    The renewal playbook State is set Closed and Progress is set to Completed.

    Note: If after creating the renewal playbook, you close or cancel the playbook, all pending activities and lanes are automatically canceled and playbook State is set to Canceled.

Define risk signal to solution relationship

Use this option to associate a risk signal with an internal play or a success case.

Before you begin

- Role required: sn_acct_lc.ale_success_agent
- Risk signals, internal plays, and success cases must have been defined.

Procedure

1. Navigate to the **All** menu and enter `sn_acct_lc_risk_signal_solution_relationship.list`
2. Click **New** in the Risk Signal to Solution Relationships page.
3. On the form, fill in the fields.

Success case form

Field	Description
Number	System generated unique number for the record.
Solution table	The solution you select here is associated with the risk signal. Select one of the following: ○ Internal play ○ Internal play task ○ Success case ○ Success case task
Solution record	Based on the solution you have selected, choose the internal play or success case for which the relationship is being defined.
Risk signal and issue	Select the risk signal for which the solution is being associated.

4. Click **Submit** to create the risk signal to solution relationship.
   This allows you to track the risk and view the proposed solutions to address the risk.

Create a success blueprint template

Create a success blueprint template with predefined success objectives and outcomes.

Before you begin

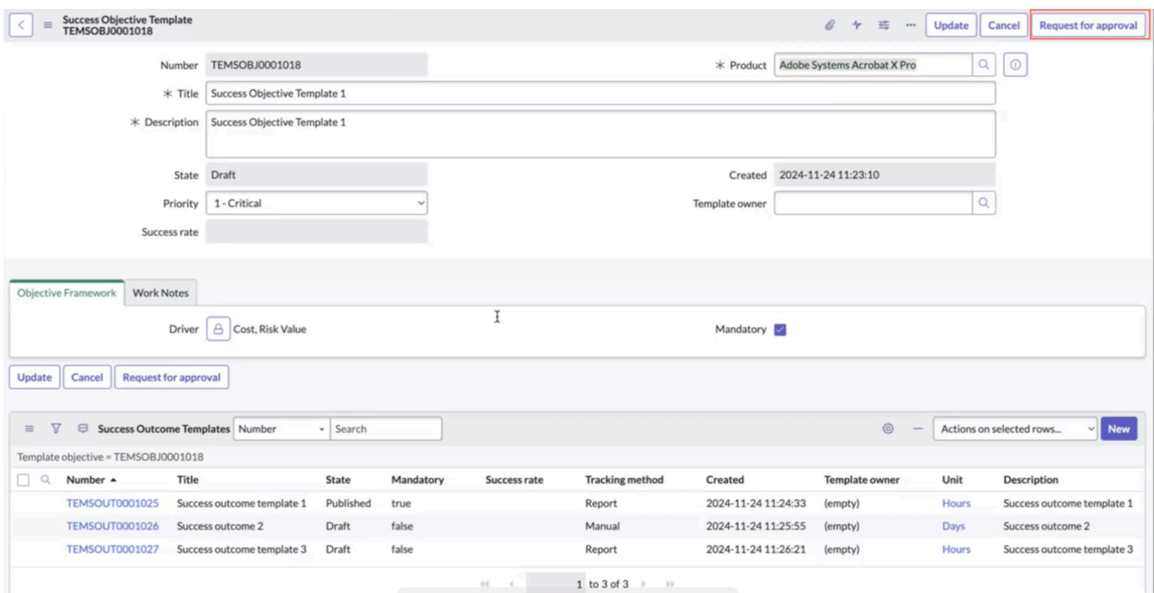
- Role required: sn_acct_lc.success_template_owner, sn_acct_lc.success_template_approver
- The *sn_acct_lc.enableApprovalForSuccessTemplate* system property must be set to **True**.

Procedure

1. Login as a user with the template owner (sn_acct_lc.success_template_owner) role.
2. Navigate to **All** > **Customer Success** > **Success Objective Templates**.
3. Enter a name and title for the template.
4. In the Product drop down list, from the CMDB model list, select the product for this success objective will be applicable.
5. In the Objective Framework section, you can do the following:
   - Select the *Mandatory* checkbox to set this as a mandatory objective for your engagement.
   - Click the icon next to the Driver field to add the key drivers for this template. The drivers you select will be used to calculate the health and risk score for the associated product.

   Note: If a success objective is marked as mandatory, it will be automatically be selected when you create an engagement for the associated product.
6. Click **Save**.
   The next step is to create a success outcome template.
7. Navigate to the **Success Outcome Templates** related list and click **New**.
8. Enter a title and description for the outcome template.

9. In the Outcome Measurement section, you can specify the following:
    - Tracking method: Select `Metric` or `Manual` from the drop down list.
    - Units: Select the measurement unit for this outcome.
    - Mandatory: Select the `Mandatory` checkbox to set this as a mandatory outcome for your engagement.
10. Click **Save** the success outcome template.
    - You can modify the template and make changes if it is in a `Draft` state. After you have made the changes, click **Update** to update and save the changes.
    - You can follow this process to add multiple success outcome templates.
11. Click **Publish** to publish the success outcome template and click **Update**.
    - You cannot modify a success outcome template that is in the `Published` State.
    - Click **Cancel** to cancel a success outcome template that has not been approved. You will see a message indicating that all associated tasks will be canceled and any progress is lost. Click **Yes** if you no longer want to use this template.
12. After you have created and published all the success outcome templates, click **Request for approval**.



Note:

- The **Request for approval** option can be used to publish success objectives only if the `sn_acct_lc.enableApprovalForSuccessTemplate` property has been set to **True**.
- You must create at least one success outcome template for a success objective.
- You must publish all success outcome templates before you can request the success objective template to be approved.

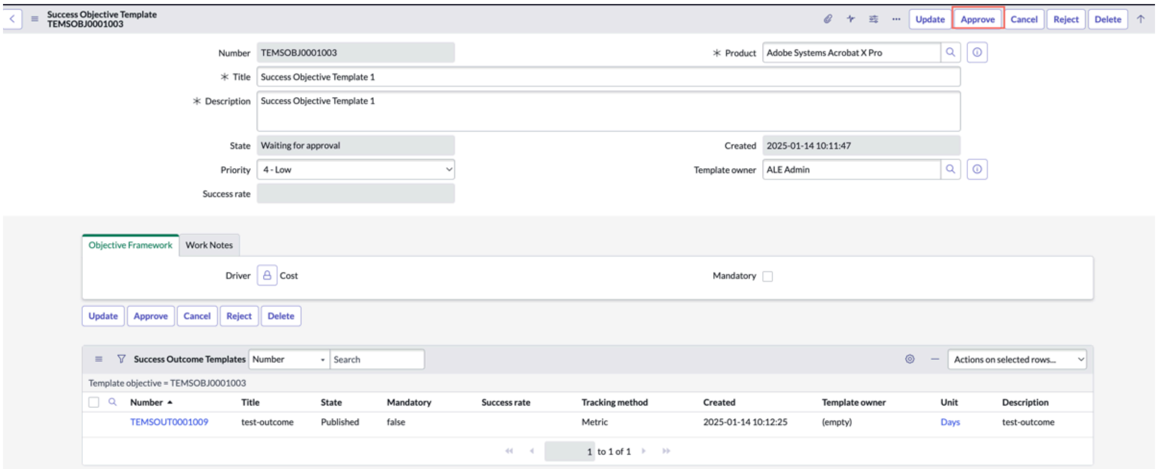
The State field is updated to `Waiting for approval`.

What to do next

Approve a success blueprint template

To approve a success blueprint template request, follow these steps:

1. Login as a user with the template approver (sn_acct_lc.success_template_approver) role.
2. Navigate to **All** > **Customer Success** > **Success Objective Templates**.
3. Open the template with the *Waiting for approval* State.



4. Click **Approve** to approve the template. The State is updated to *Approved*.

   If you don't want to approve the template, you can click **Cancel** or **Reject** to cancel the process. The State is updated to *Draft* if canceled or rejected.

5. After the template has been approved, click **Publish** to publish the template.

   Note:

   - After a template has been published, it can longer be modified.
   - Click **Retire** to retire a template. A retired template can no longer be used to define objectives and outcomes for an engagement.

Create a success blueprint

Use this option to create a success blueprint to add success objectives and outcomes for the engagement.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

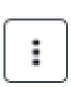
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Navigate to the **Customer Success** > **All Engagements** and open an engagement record.
3. On the engagement page, navigate to the **Success blueprint** tab and click **Create success blueprint**.
   A list of available success blueprint templates that are available for this engagement are displayed. By default, the mandatory objectives are automatically selected. You can select from the list of optional objectives.
4. Select a product from the list.
   This is the list of applicable sold products that have been associated with the engagement when it was created.
5. Based on the product you have selected, you can see a list of objectives that have been defined.

- All objectives: All the success objectives defined in the template are displayed.
- Mandatory objectives: By default, all mandatory objectives are automatically selected.
- Optional objectives: You can select one or more optional objectives for this engagement.

6. You can also use the following options to filter the list of objectives displayed:
    - Search: Enter the title or description to display objectives that meet the criteria.
    - View by drivers: Select an option from the drop down list to view objectives that have the selected driver associated with them.

    For each objective, you can see the key drivers, success outcomes defined, and the associated product.
7. After selecting the objectives, click **Next** to continue.
    You can see the selected objectives along with the outcomes defined for each objective.
8. On this page, enter values in the following mandatory fields:
    - Start date: Enter the date from which the outcome will be effective.
    - End date: Enter the date till which the outcome will be effective.
    - Objective owner: The individual responsible for the objective from the provider side.
    - Sponsor: External contact responsible for the objective.
9. Use the **Toggle** button to select or deselect any of the optional outcomes.
    The mandatory outcomes are selected by default and cannot be deselected. Click the **Edit outcome values** option to add the Base and Target values for the selected outcome and click **Save**.
10. After you have configured the objectives, click **Save Objective**.

    Note:

    - If you click the **Back** button or refresh the page after saving the objective, all the changes will be lost.
    - If you are adding more than one objective, you must save the details for each objective before moving on to the next one.
11. Click **Create** to create the success blueprint.
    The newly created success blueprint now appears on the Success blueprint page. See Success blueprint for details.
12. Click the **View initiative roadmap** to view the success initiative roadmap with engagement details including the current health, stage, and the next renewal date for the engagement.
    In the roadmap view:
    - The initiatives are color coded according to their progress and the color description is provided in the tooltips listed at the bottom of the page.
    - The initiatives are grouped according to the status of the objectives and outcomes for better association.
    - Metrics such as Assigned to, Priority, Category, Number of Tasks, and Days remaining are shown on the timeline.
13. Click the  icon and select one of the following options:

- Add objectives: Select and add any optional objectives you want add to your success blueprint. Select the objective to be added, click **Next**. Use the Toggle option to select any of the optional outcomes, enter other mandatory details, and click **Save Objective** and then click **Create** to add the objective along with the outcome to the success blueprint.
- Add outcomes: Select any optional outcomes that you want to add to your success blueprint.

14. Click the icon to drill down to the Success objective record page.

Measure success rate

Measure and track the effectiveness and completion of success objectives and outcomes within a project or engagement with success scores and success rates.

Calculate success rate of a success objective

When a success outcome has been completed, you can close the record, update the status, and verify the values in the success outcome template.

1. Navigate to the *`Success blueprint`* tab on the Engagement page.
2. Select an objective and click on the icon to drill down to the Success Objective page.
3. Select a Success outcome from the list and click **Edit** to drill down to the Success Outcome page.
4. Update the State field to *`Closed`*.
5. Select the Closure code from the drop down list:
    - Achieved: If you select this option, it indicates that the outcome was successfully achieved and the success rate is set to 1.
    - Missed: This option indicates that the outcome was not met. The success rate is set to 0.
    - Canceled: If the Closure code to set Canceled, the success rate is skipped for this outcome.
    - Partially achieved: If the outcome is partially achieved, the success rate is set to 0.5
6. Enter the Close notes and click **Save**. Once an outcome has been closed, navigate back to the Success Objective page. You can see that the status of the success outcome is set to *`Completed`* and the `value realized` percentage has been updated.
7. Follow these steps to close all success outcomes for the selected objective.

Note: The success score of an objective is the average score of all closed and partially closed outcomes associated with that objective. Only outcomes generated from the success outcome templates are used to calculate the score. Manually created outcomes are not included.

For example, if an objective has three outcomes with following closure states:

- Outcome 1: Achieved
- Outcome 2: Partially Achieved
- Outcome 3: Canceled

In this case, the success rate is calculated as (1+0.5)/2 = 0.75* 100 = 75%

Calculate the success rate of a success objective template

The success objective template rate is the average of the scores of all the associated objectives that have been created from the success objective template. If success objectives created from a specific template have the following success rates:

- Success Objective 1: 50%
- Success Objective 2: 60%
- Success Objective 3: 70%

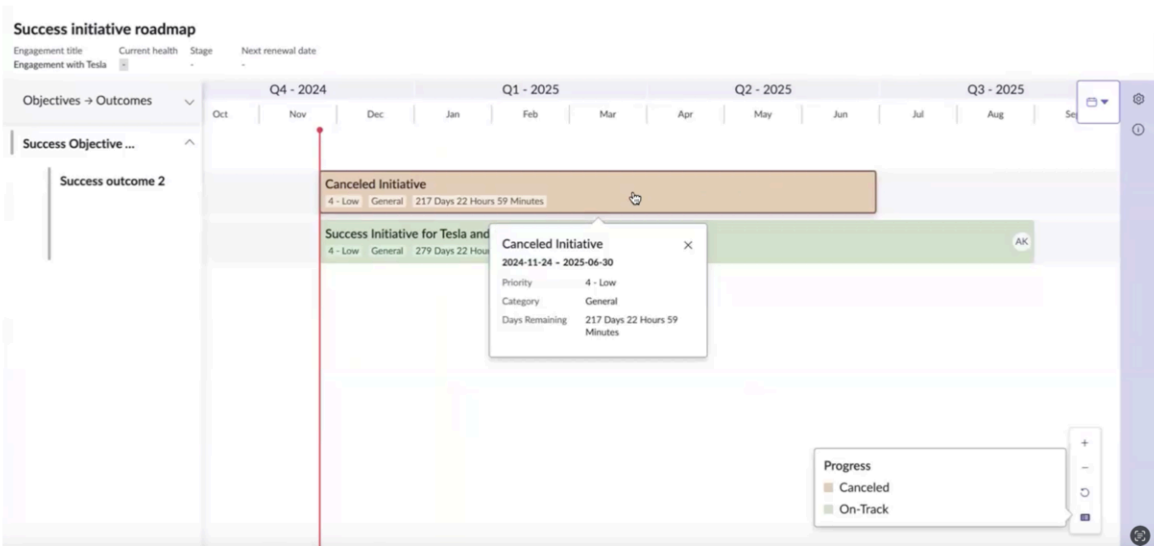
In this case, the success score or the average is 60%.

Success initiative roadmap

The success initiative roadmap shows the status of the success initiatives over a period of time.

To view this page, follow these steps:

1. Navigate to the *Success blueprint* tab on the Engagement page.
2. Click the **View initiative roadmap** option. You can see a visual representation of the success initiatives and the outcomes based on the Due date.



The list of outcomes is displayed in the left panel. Select an outcome from the list to view the initiatives associated with it. You can hover over an initiative to see a quick snapshot. You can customize the roadmap view:

- Click on the *Progress* option to select the types of initiatives (Canceled, On-Track, Completed) you want to view.
- Click on the **Select timescale** icon to view the roadmap by year, month, or quarter.
- Click on the **Gear** icon to personalize the view by grouping, color, metrics displayed, and so on.
- Select an initiative to view the initiative record in the side panel. You can do the following:
  - Modify the record if required and click **Save**.
  - Click the *Comments* tab to add any additional comments.
  - Click the *Attachments* tab to add one or more attachments to this initiative.

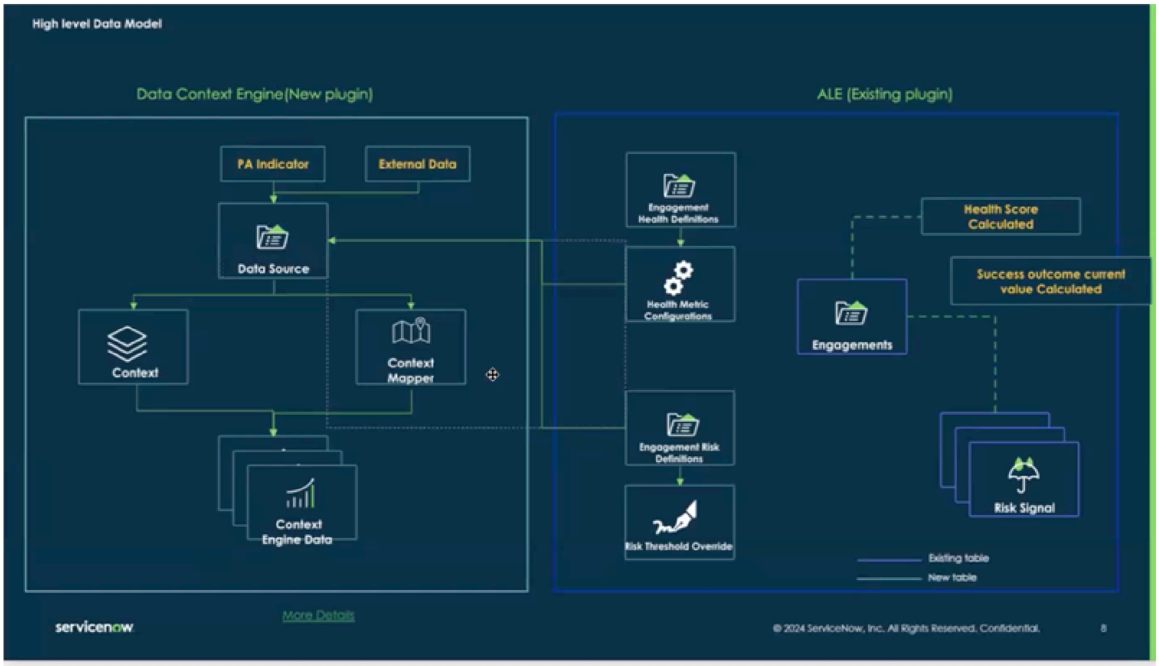
  make any changes if required and click **Save**.

Note: By default, you can view the roadmap for a ten year period. You can modify this value in the sn_acct_lc.RoadmapTimelineYears.list property.

Setup the data context engine

Define and measure metrics to calculate the health score or generate risk signals for one or more engagements.

Data is collected either from performance indicators or external sources as defined in the data source and is used to calculate the health score, generate risk signals, or create success outcomes. The following diagram shows the high level data model.



To collect and use the data, you must setup the data source to specify whether data is being collected from PA indicators or external sources. In the context table, you must associate the data source with an engagement or success outcome table. Based on the context, you must specify the record in the context table for which this data is applicable. Data is stored in the Context Engine Data table and when the scheduled jobs are run, the heath score, risk signals, and success outcomes are updated.

To setup the data context engine, follow these steps:

- Define the data source
- Set up the context engine mapper

After the data context engine has been set up, you can configure the health and risk definitions:

- Setup the engagement health definition
- Setup the engagement risk definition

Define the data source

Before the health or risk score can be calculated, you must specify the source from which data is to be collected. Data can be collected either through key performance metrics or external sources.

To define the data source, follow these steps:

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **All** > **Data Context Engine** > **Data Sources** > **Create New**.
3. Enter the following details:

Field	Description
Name	Enter a name for the data source.

Field	Description
Source	Select the source from which the data is to be collected. This can be: ◦ PA indicator: An automated scheduled job collects data and creates records in the Context Engine Data table. ◦ External: Specify the external data source from which the data is to be collected. **Note:** If you select the **External** option, you must define how this data can be retrieved from the external source or use the Table API to save this information in the Context Engine data table.
Frequency	Select the frequency at which the data should be collected. This can be: ◦ Daily ◦ Weekly ◦ Monthly ◦ Quarterly **Note:** If you select PA Indicator as your data source, you must select a frequency equal to or greater than the PA Indicator collection frequency. For example, if the PA Indicator is collecting data once a week, you cannot select a frequency that is lower than Weekly here.
PA indicator	Select the metric for which the data is being collected.
Breakdown	Select the attribute or category by which the health or risk score is to be grouped. This can be account, product, and so on.
Unit of measurement	Select the unit of measurement for the PA indicator. This can be minutes, hours, days, months, and so on.
Aggregate	Select how the aggregate score should be calculated. This can be: ◦ Average ◦ Sum ◦ Max ◦ Min The Aggregate score is useful if you select a Frequency that is different from the collection frequency of the PA indicator. For example, suppose the PA indicator collection frequency is set to Daily, and the Frequency is set to Weekly, you need to calculate the aggregate score for the week. In this case, you can use the average or sum option to calculate the score.

4. Click **Submit** to create this data source.
5. Navigate to the Contexts related list and click **New**.

6. In the Context page, select the table for which this data source is applicable. This can be an engagement or success outcome table. You can define multiple context tables for a single data source.

   Note:

   - For calculating the health score, you must select the Engagement table.
   - For calculating the success outcome, you must select the Success Outcome table.

7. Enable the **Active** checkbox and click **Submit** to create the data source. You can associate the data source with one or more context tables.

After setting up the data source and the context, you set up the context engine mapper.

Set up the context engine mapper

After you have defined the data source, the next step is to specify the record in the context table for which it is applicable.

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **All** > **Data Context Engine** > **Context Engine Mappers** > **Create New**.
3. Enter the following details:

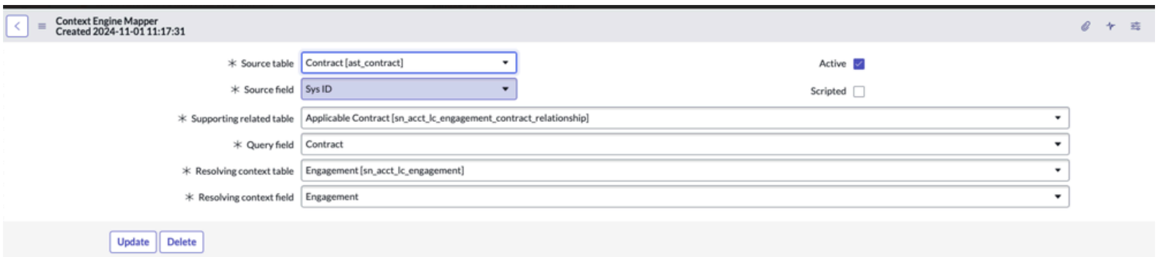
Field	Description
Source table	Select the source table to which the data source is to be mapped. This table is related to the attribute selected in the Breakdown field in the Data Source table. For example, if you selected *`Account`* in the Breakdown field, select the Customer Account table here.
Source field	The specific field in the source table that contains the data to be mapped.
Supporting related table	The related table that will be used to connect the source and context tables.
Query field	Select the field that is used to query or dot walk the *`Supporting related table`* to map data from the *`Source table`* to the *`Context table`*.
Resolving context table	The target table for mapping the data source.
Resolving context field	The target field where the mapped data will be stored.
Script	If you cannot query the context table through dot walking, you can define a script that uses the Source field and returns an array of possible context fields.

Note: You can set up the context engine to map the source and target tables using one of the following methods:

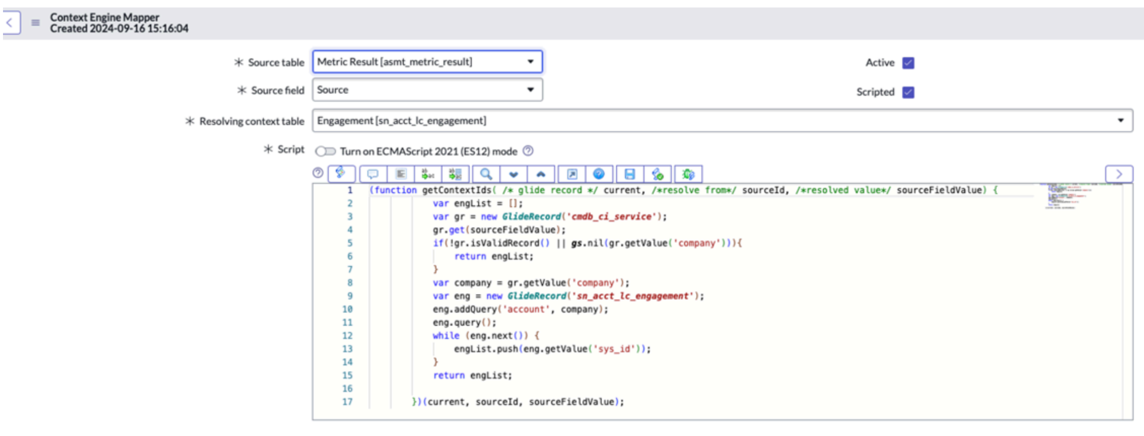
- Related table: Use the mapping rule `related table[query_field] = source table[source_field]`. In every record in the *`Source table`*, the *`Source field`* value is matched with the *`Query field`* in the Related table.
- Script: The script checks the *`Source Field`* and the ID of the record to determine the appropriate context based on the resolving context table.

The following examples show how you can set up the mapping.

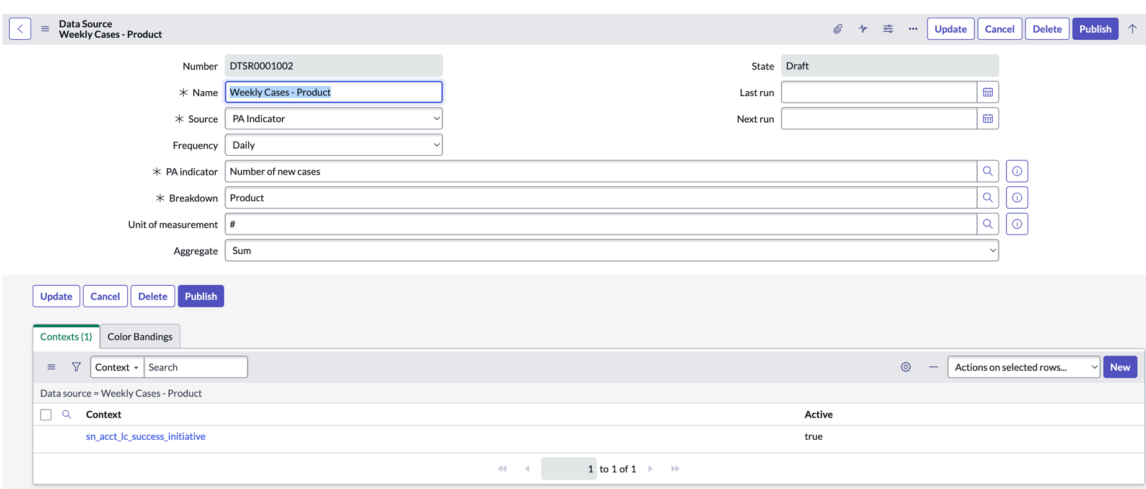
Example with Related table



Example with script



4. Click **Submit** to save the context mapping.
5. Navigate to **All** > **Data Context Engine** > **Data Sources**.



6. Open the data source you had created earlier and click **Publish**.

   Data will now be collected as per the defined schedule and the context engine data record is created and stored in the **Context Engine Data** table.

Setup the engagement health definition

Use the engagement health definition to configure the metrics required to calculate the health score for an engagement.

Before you begin

- Role required: sn_acct_lc.ale_success_agent
- Data source and data context engine mapping must be setup. See Setup the data context engine.

About this task

To view the health scores for an engagement, you must setup the health definition and configure the health metrics. For each health definition, you can add one or more data sources that will be used to calculate the health score.

Procedure

1. Navigate to **All** > **Success Configuration** > **All Health Definitions** > **New**.
2. Enter the Name, Rank, and Description for the engagement.
   The Rank field is used to prioritize the health definition. The h
3. Select the `Global configuration` checkbox if you want to apply this health definition to all engagements.
4. If you want to apply the health definition to a specific engagement, add a filter condition in the Definition section.
   You can click on the `No of records matching the condition` link to view all engagements that match the condition.

   Note: Health definitions that are applicable to one or more engagements take precedence over the global health definition.

5. Click **Submit** to create the health definition.
6. Open the health definition you have created, navigate to the Health Metric Configurations related list, and click **New**.
   You can specify the data sources that will be used to calculate the health score of the engagement.
7. Enter the following details:

Data source	Select the data source that will be used to calculate the health score.
Engagement health definition	The engagement for which this health metric is being configured.
Target	This is the target or ideal health score for the engagement.
Weight	The weight or percentage assigned to this metric in calculating the overall health score of the engagement. If you are defining two or

	more data sources for the health definition, the total weight across all the data sources should be equal to 100. For example, for these data sources, you can specify the Weight as follows: ◦ Daily collection of CSAT: 40 ◦ Weekly cases: 40 ◦ Daily cases: 20
Direction	You can select: ◦ Maximize: The higher the target, the better the score. For example, CSAT score: A higher value indicates a better score. ◦ Minimize: The lower the target, the better the score. For example, Number of P1 cases: Fewer cases indicates a better performance.
Aggregate	If multiple data records are returned for a data source, select how the aggregate score should be calculated: ◦ Average ◦ Sum

8. Click **Publish**.
   When the next data collection occurs, the health score is calculated and published on the Engagement page.

Setup the engagement risk definition

Use the engagement risk definition to configure the metrics required to define the risk signals for an engagement.

Before you begin

- Role required: sn_acct_lc.ale_success_agent
- Data source and data context engine mapping must be setup for metric based risk definitions. See Setup the data context engine for details.
- For table based risk definitions, an active context engine mapping with source table as Engagement must be defined.

About this task

You can define the risk conditions, risk category, and threshold values for an engagement in two ways:

Metric based risk definition

Use this option to create or update risks if the specified threshold is breached. The context engine data records are generated after the last scheduled job is run. The context in this case is the engagement table. If the threshold specified in the risk definition is breached, a risk is generated.

Table based risk definition

Use this option to create or update risks for all records that match the condition in the selected table. When the scheduled job is run, if an active risk that matches the criteria is present, a new risk occurrence record is created. If no active risks are present for the source record+engagement+category combination, a new risk signal is generated for each record.

New risks are generated automatically when the Customer Success Risk Analyzer scheduled job is executed.

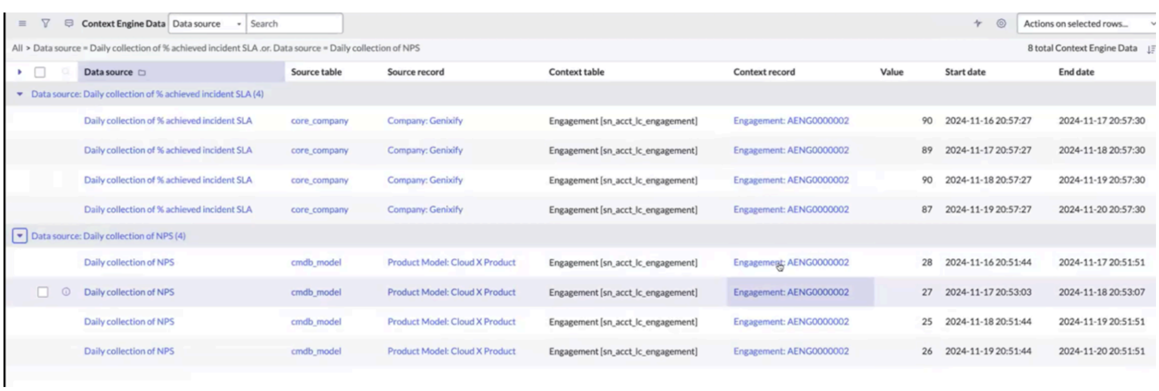
Procedure

1. Navigate to **All** > **Success Configuration** > **All Risk Definitions** > **New**.
2. Enter the following details:

Field	Description
Name	Enter a name for the risk definition.
Category	Select a category for the risk definition. The risk categories displayed here are defined in the ALE choice record.
Type	Select the type of risk definition. This can be: ◦ Metric ◦ Table
Description	Enter a description for the risk definition.
`Metric based:` This option is used to create or update risks if a risk threshold is breached. If you are creating a metric based risk definition, select the metric, define the thresholds, set up the template, and specify conditions to define the list of applicable engagements.	
Metric	Select the metric definition that has been configured in the Data Source table and mapped with the context engine mapper. See Setup the data context engine for details.
Threshold condition	Specify the threshold condition for the risk definition. If this threshold condition is breached, a risk signal is generated. For example, for the Daily collection of CSAT, the metric threshold condition is set to be less than 50. If the value falls below 50, a risk is generated.
Threshold	Specify the base threshold for the metric definition.
Applicable engagements	If you select an applicable engagement, this risk definition will be evaluated for the engagements in the Applicable engagements list.
`Table based:` This option is used to create or update risks in all records in the matching table and the specified condition. If you are creating table based risk definition, you must select the table, specify the condition, and set up the template with fields and values to generate risks in the specified format.	
Source table	Select the source table for which the risk definition is to be created. **Note:** A context mapper must have been defined that associates the source and the context tables. See Setup the data context engine for details. For example, if you want to define risk signals for a contract, and select Contract as your source table, a context mapping with a Contract to Engagement association must have been defined.

Field	Description
Conditions	Specify any conditions that need to be used for the risk definition for the selected source table. Risks are generated for the records in the source table that satisfy the specified conditions.
Template	Click the Template tab to define the fields for the risk definition. The following are mandatory fields: ◦ Short description ◦ Description ◦ Reported by

3. Click **Submit** to create the risk definition.
4. If you want to define risk threshold overrides for a metric based definition, open the risk definition you have created, navigate to the *`Risk Threshold Overrides`* related list and click **New**.
   Enter the following details:
   - Engagement risk definition: This is the engagement risk definition for which you are creating an override condition.
   - Threshold: Specify the override threshold value.
   - Click **Add Filter Condition** or **Add Or Clause** to specify additional override conditions.
   - Rank: Specify a rank for this override condition. 1 is highest rank. If an engagement matches multiple threshold overrides, the engagement with the highest rank is considered first.
5. Click **Submit** to create the override condition.
6. Click **Publish**.
   When the next scheduled job is run, the risk signals are generated. Navigate to **Data Context Engine** > **Context Engine Data** to see the date and time the risk signals are generated.

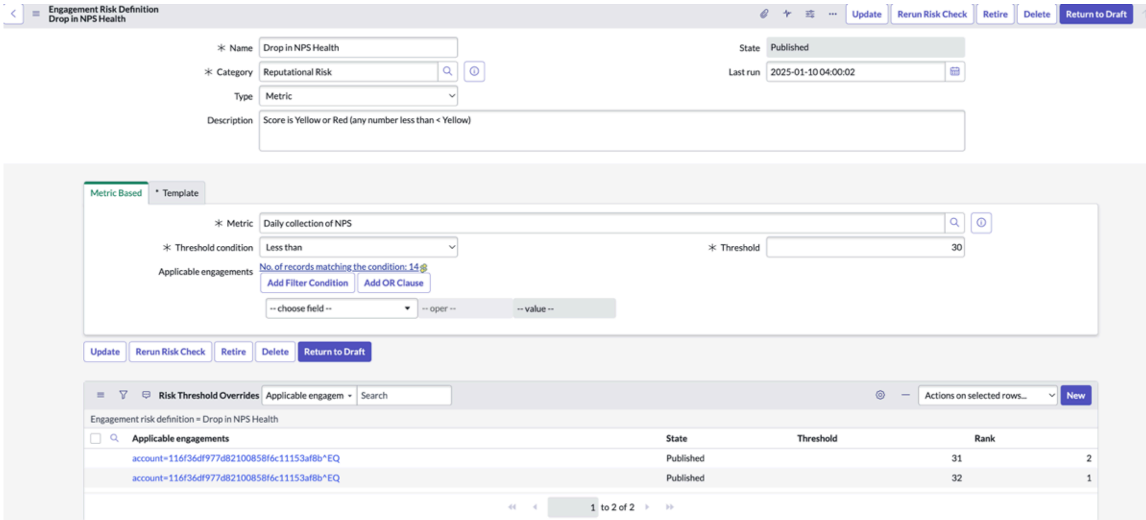


Sample risk definitions

These are sample risk definitions available with the base system and can configured based on your requirements.

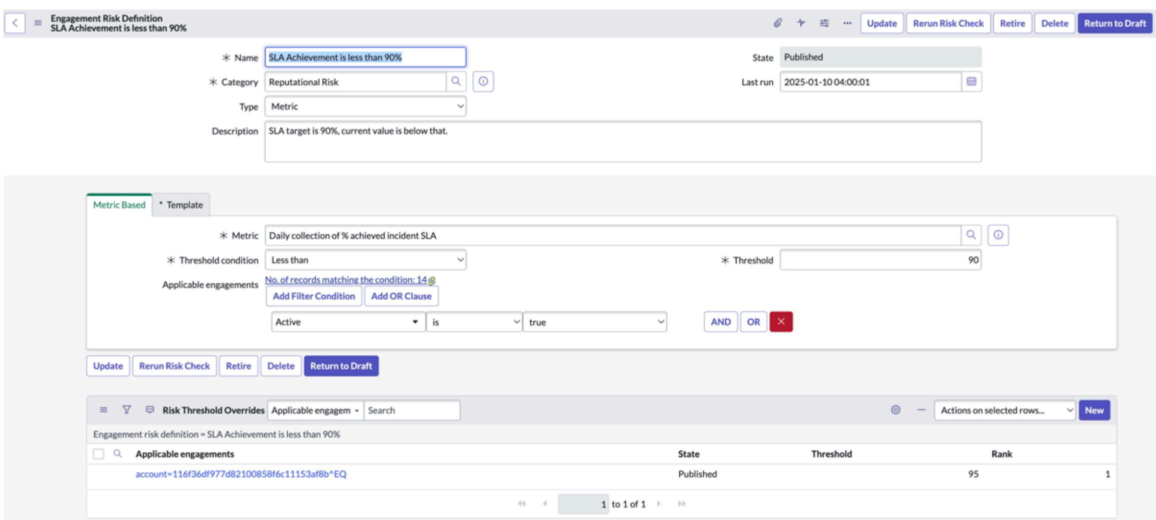
Drop in NPS health

This is a metric based risk definition and generates a risk signal if the NPS score falls below a specified threshold. In this case, if the Daily collection of NPS metric score falls below 30, a risk signal is generated. Additionally, override conditions with different threshold values and ranking that can impact specific engagements are defined.



SLA achievement in less than 90%

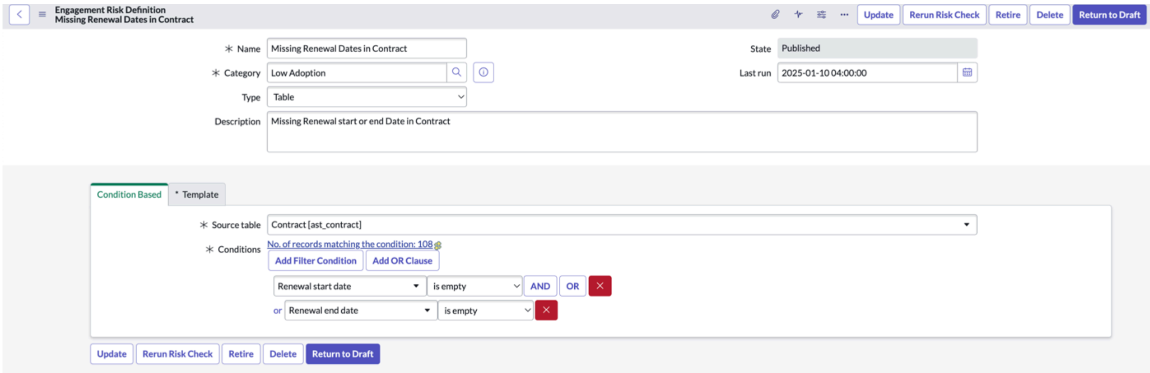
This is a metric based risk definition and generates a risk signal if the SLA achievement score falls below a specified threshold. In this case, if the Daily collection of % achieved incident SLA metric falls below 90, a risk signal is generated. An override condition with a different threshold value that can impact specific engagements has been defined. Additionally, a filter condition has been defined in the Applicable engagements field. This filter condition is applied along with the override condition when the risk signal is generated.



Note: For metric based definitions, the data source and the context engine mapping must be defined. See Setup the data context engine for details.

Missing renewal date in contract

This is a table based risk definition and generates a risk signal if the contract renewal date are missing. In this case, the Source table is the Contract table. This table must be mapped to the Engagement table. See Set up the context engine mapper for details. If the renewal start and end dates are missing in the Contract table, a risk signal is generated.



Setup the color banding table

Use the color banding table to set up how the engagement health score is visually represented in the Success Landing and Engagement pages.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

1. Navigate to **All** > **Success Configurations** > **Color Bandings**.
2. Click **New** to create a new color banding and enter the following details:

Field	Description
Type	Select the type of color banding being created. This can be: ○ Global: Use this type to create color banding that is applicable to all engagements. ○ Metric based: This type is used to create color banding that is applicable to all engagements associated with the selected data source.
Min	Enter the minimum value that will be applicable to the color banding being created.
Max	Enter the maximum value that will be applicable to the color banding being created.
Data source	For metric based type, select the data source for which the color banding is to be created. The color banding will be applicable to all engagements associated with the data source.
Color	Select the color for the color field to be used to show the health score. For example, you can create a color banding with the following parameters: ○ Min: 70 ○ Max: 100 ○ Color: Green The green color is applied to all applicable engagements with a health score that falls between 70 and 100.
Highlighted color	This is the color used to highlight the health score and perceived health of an engagement.

Field	Description
Context	Specify the context for which the color banding configuration is applicable. A single data source can have multiple configurations based on the context.
Category	Select the category for the Min and Max ranges you have specified. This can be used to identify if the values meet the threshold, fall below, or exceed the threshold. The categories you can select are: ◦ Poor ◦ Neutral ◦ Good ◦ Over

Integrating with Microsoft Dynamics CRM

Integrating your ServiceNow instance with the Microsoft Dynamics CRM platform enables seamless data exchange and process synchronization between the two platforms. This integration is done through the Microsoft Dynamics CRM spoke.

By enabling integration of the Microsoft Dynamics CRM platform during the engagement lifecycle you can track renewals, assess risks, and create renewal opportunities. The Microsoft Dynamics CRM integration is available with the Customer Success Management application and can be configured to work with other CRM platforms.

The following use cases are supported:

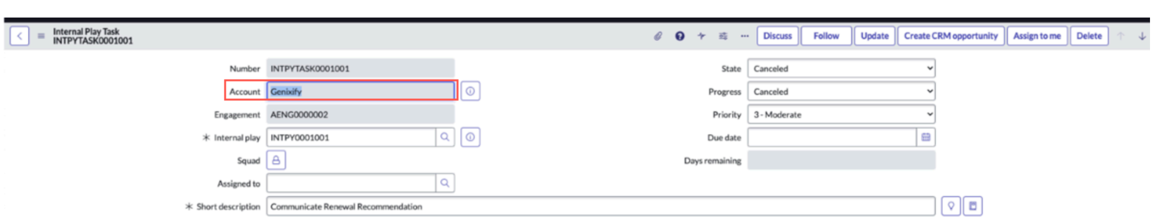
- Creating opportunity for renewals from renewal playbooks.
- Creating task from risk record when renewal date is missing in the account.
- Updating the ServiceNow records when any change is made to the CRM task table.

To set up the integration, follow these steps:

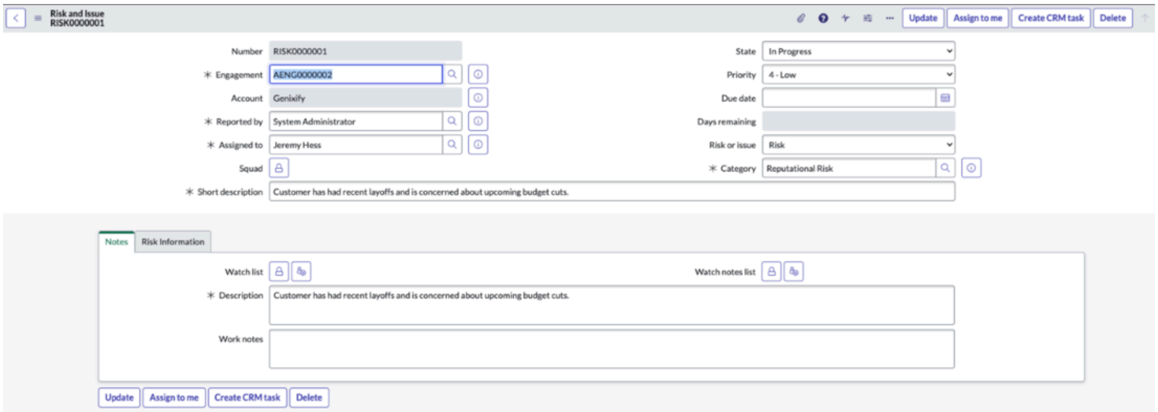
Note: Before you set the integration, you must configured the Recommended Actions application. See Set up Recommended Actions for account onboarding for details.

1. Set up the Microsoft Dynamics CRM spoke. See Microsoft Dynamics CRM Spoke for details.
2. On the Microsoft Dynamics CRM platform, you must do the following:
   - Create an account with the same name as the account associated with your internal play task.

     Before creating an opportunity from an internal play task, make a note of the account associated with the task.

     Before creating a task from the risk signal, make a note of the account associated with Risk and Issue record as shown below.



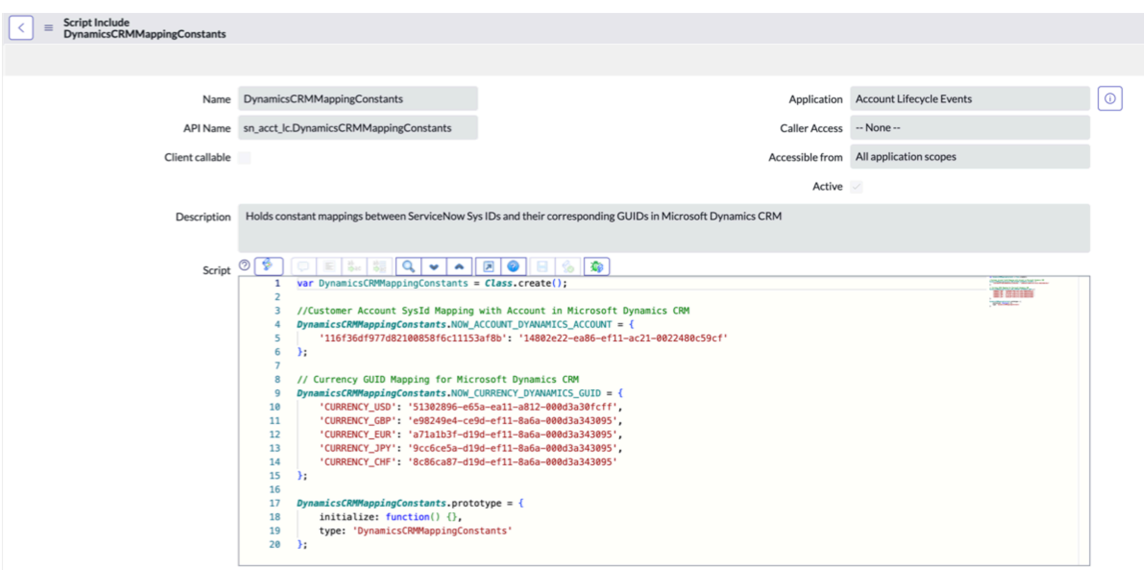
In the Microsoft Dynamics CRM platform, you must create an account with the same account name (**Genixify**) associated with your internal play task as shown in the above examples. This account must be configured later in the mapping file.

- Create currencies that correspond to the currencies in the Customer contracts table. While creating currencies, you must add the name of the currency with the symbol in the `TechOnbConstants` script include as follows:

```
TechOnbConstants.MS_DYNAMICS_CRM_CURRENCY = {
    '£': 'CURRENCY_GBP',
    '$': 'CURRENCY_USD',
    '€': 'CURRENCY_EUR',
    '¥': 'CURRENCY_JPY',
    'CHF': 'CURRENCY_CHF'
};
```

Note: Use the *`DynamicsCRMMappingConstants`* script include to define mappings between ServiceNow Sys IDs and their corresponding GUIDs in Microsoft Dynamics CRM.

Sample mappings are shown in the following image.



3. Update the `getRiskSysIdFromCRMRequest()` function in the `DynamicsCRMTaskUpdateHandlerUtilOOB` script include to handle the task updates

from Microsoft Dynamics CRM by processing the input parameters and updating the associated risk signal record.

The Process Task Update Event demo action can be further configured and added as part of sub flow which you would need to create and add it in the decision table (Dynamics CRM Webhook Decision Policy) of Microsoft Dynamics CRM Spoke.

4. (Optional) You can optionally configure an UI action to create a CRM task in your ServiceNow instance.
5. Use the `AleCRMUtilOOB` script include to interact with CRM platforms like Microsoft Dynamics CRM.

   Use The `executeAction` function perform actions like creating opportunities or tasks on the CRM platform.

   ```
   executeAction(CRMPlatformName, action, recordData)
   where
   - CRMPlatformName is the name of the CRM platform on actions
    are to be performed.
   - action is the action to be performed
   - recordData is the SysID of the risk signal record that is
    updated when the action is performed.
   ```

The following examples show how you can create an opportunity or a task in Microsoft Dynamics CRM:

- **Creating an Opportunity in Microsoft Dynamics CRM**:

  ```
  var aleCRMUtil = new AleCRMUtil();

  var CRMPlatformName = 'MS_DYNAMICS';
  var action = 'OpportunityCreationWithSpoke';
  var recordData = { internalPlayTaskSysId:
   '02de3efaeb3d5a10ddd6f94fbad0cd16' };

  var response = aleCRMUtil.executeAction(CRMPlatformName,
   action, recordData);

  gs.info('Opportunity Creation Response: ' +
   JSON.stringify(response));
  ```

- **Creating a Task in Microsoft Dynamics CRM**

  ```
  var aleCRMUtil = new AleCRMUtil();

  var CRMPlatformName = 'MS_DYNAMICS';
  var action = 'TaskCreationWithSpoke';
  var recordData = { riskSignalIssuesSysId:
   'b07062b53ba29a10be57327aa5e45a0c' };

  var response = aleCRMUtil.executeAction(CRMPlatformName,
   action, recordData);

  gs.info('Task Creation Response: ' + JSON.stringify(response));
  ```

After you have setup the integration, you can do the following:

- Create an opportunity in Microsoft Dynamics CRM
- Create a task in Microsoft Dynamics CRM

Using customer success

Learn how your organization can use the customer success solution to engage with your customers, mitigate risks by running success plays, and identify opportunities for expansion and renewals.

This section covers the following:

- Success portfolio dashboard
- Engagement home page
- Success objective record page

View customer success cases in the Customer Service Portal

View the customer success case records or case task records on the Customer Service Management (CSM) portal.

Before you begin
Role required: admin

- sn_acct_lc.ale_success_agent
- sn_acct_lc.ale_success_customer
- sn_customerservice.customer_case_manager

Procedure

1. Use the name and password that you created during the registration process to log in to the Customer Service Portal.
   See Using the Customer Service Portal for the details.
2. On the home page, select **My Lists** to view the customer success cases and case tasks. Depending on your user role, you can view the following lists:
   - All Success Initiatives: Available for internal users with sn_acct_lc.ale_success_agent and for customers with sn_acct_lc.ale_success_customer and sn_customerservice.customer_case_manager.

     All Success Initiatives associated with the customer engagement is displayed in the form of a list.
   - My Success Initiatives: Available for users with sn_acct_lc.ale_success_agent and sn_customerservice.customer_case_manager.

     For internal users, all the success initiative assigned to logged-in user is shown in the list.

     For customers, in the success initiatives form visible to the customer check box must be true and the logged-in user must be in the contact filter.
   - All Success Cases: Available for internal users with sn_acct_lc.ale_success_agent and for customers with sn_acct_lc.ale_success_customer and sn_customerservice.customer_case_manager.

     All the success cases associated with the customer engagement are displayed in the form of a list.

- My Success Cases: Available for users with sn_acct_lc.ale_success_agent and sn_customerservice.customer_case_manager.

  For internal users, all the success cases assigned to logged-in user are shown in the list.

  For customers, in the success cases the form visible to the customer check box must be true and the logged-in user must be in the contact filter.

- All Touchpoints: Available for internal users with sn_acct_lc.ale_success_agent and for customers with sn_acct_lc.ale_success_customer and sn_customerservice.customer_case_manager.

  All the touchpoint cases associated with the customer engagement are displayed in the form of a list.

- My Touchpoints: Available for users with sn_acct_lc.ale_success_agent and sn_customerservice.customer_case_manager.

  All the touchpoints assigned to the logged-in user are shown in the list.

Note: When you search for something on the service portal, the search results are shown in separate **Sources**: Success Cases, Success Case Tasks, Success Initiatives, and Touchpoints.

3. Select on the **All Success Initiatives** in the list.
   All the success initiatives related to the selected account are displayed.
4. Select on a **Success Initiative** in the list.

   Note: The Header section for the case and case tasks can be configured and you can add or remove fields as required.

   The following details are displayed for each case.

   - Header section that provides basic information about the case including case number, state, account, subject, due date, and days remaining.
   - Select the task to view additional information such as success case task, activities, and any attachments.
   - The left-hand section provides the following details:
     - General instructions: Provides a short description and a detailed case description.
     - Product information: Shows the product information.
     - Shared articles: Shows knowledge articles that have been shared with you. Select the article link to view details.
5. Select on the **All Success Cases** in the list.

   All the success cases related to the selected account are displayed.

   All the activities related to the case task are displayed.

6. Select on the **All Touchpoints** in the list.

   All the touchpoints related to the selected account are displayed.

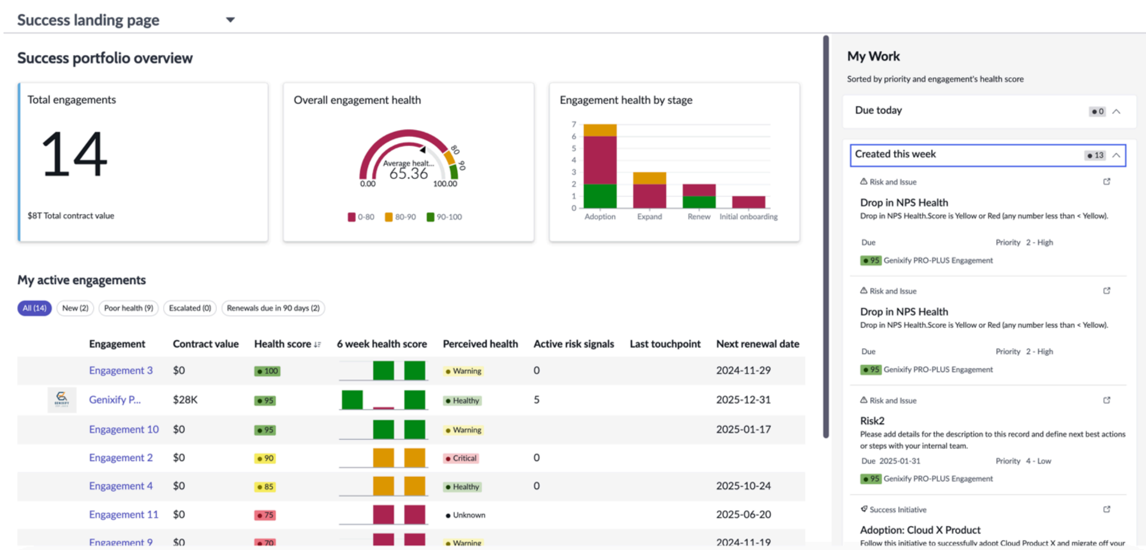
   All the activities related to the case task are displayed.

Success portfolio dashboard

Get an overall view of your success portfolio including your engagements, account status, escalations, and risks.

Login as a user with the `sn_acct_lc.ale_success_agent` role and navigate to **Workspaces** > **CSM/FSM Configurable Workspace** to view the Success landing page. This page provides a high level overview of your success portfolio. The following score cards with real time data are displayed:

- Total engagements: The total number of engagements with which you are associated. Click on the ink to drill down to the list of all your engagements.
- Overall engagement health: The average health of all your active engagements.
- Engagement health by stage: A graphical representation of all your engagements categorized by the engagement stage. Click on a bar chart to drill down to the list of engagements that are in a specific stage.



Note: The colors displayed in the Overall engagement health and Engagement health by stage cards are based on the global color banding defined in the color banding table. See Setup the color banding table for details.

In the My Active Engagements section, you can view the following:

- A list of all active engagements. You can filter this list to view engagements that meet a certain criteria such as:
  - New
  - Poor health
  - Escalated
  - Renewals due in 90 days
- For each engagement, you can view the following details:
  - Contract value
  - Health score
  - 6 week health score
  - Perceived health
  - Active risk signals

- Last touchpoint
- Next renewal date

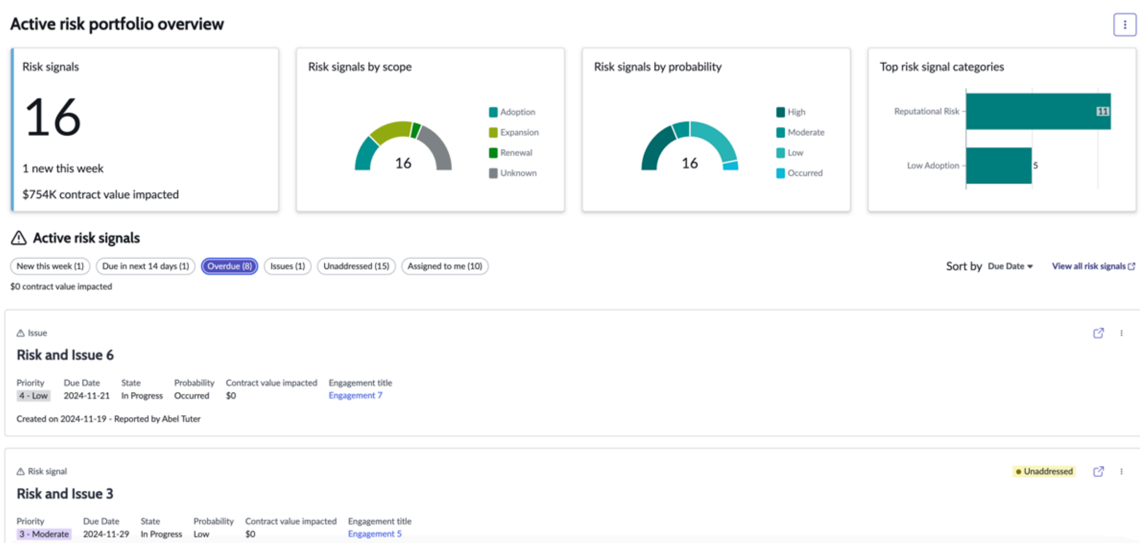
Note: The colors used in the health score displayed for each engagement is derived from the metric based color banding defined in the Color Banding table. See Setup the color banding table for details.

Click on an engagement to drill down to the detailed record page.

Risk portfolio dashboard

Get an overall view of all active risks, top risk categories, and the risk scope of all engagements with which you are associated.

Login as a user with the `sn_acct_lc.ale_success_agent` role and navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and click on the **Active risk signals** icon to view the Active risk portfolio overview page.



The following score cards are displayed:

- Risk signals: The total number of active risk signals and impacted contract value. Click on the link to drill down to the list of all risk signals.
- Risk signals by scope: Active risk signals categorized by scope or state of the engagement such as adoption, onboarding, and so on.
- Risk signals by probability: Active risk signals grouped by high, moderate, or low probability.
- Top risk signal categories: The top active risk signal categories based on the risk type defined in the ALE Choice record.

You can do the following:

- Hover over the charts to see the number of risk and the percentage by scope, probability, and category.
- Click on a specific category in a chart to drill down to the list view of all the risks in that category.
- Click on a chart to drill down to the list of total risks.

- Click **View all risk signals** to drill down to the list of all the risk signals.
- Click the ⋮ icon to Create a risk signal manually. See Create a risk signal.

The list of active risk signals are displayed. You can sort this list by Due date, Priority, Probability, or Created on date. Click **View all risk signals** to view the All risk signals page.

In the Active risk signals section, you can view the following:

- A list of all active risk signals. You can filter this list to view risk signals that meet a certain criteria such as:
  - New this week
  - Due in 14 days
  - Overdue
  - Issues
  - Unaddressed
  - Assigned to me

  The total contract value for each of these categories is displayed. You can also see the impacted contract value for each risk signal that matches the selected criteria.
- For each risk signal, you can view the following details:
  - Priority
  - Due date
  - State
  - Probability
  - Contract value impacted
  - Engagement title

  Click the ⋮ icon to Create success play manually.

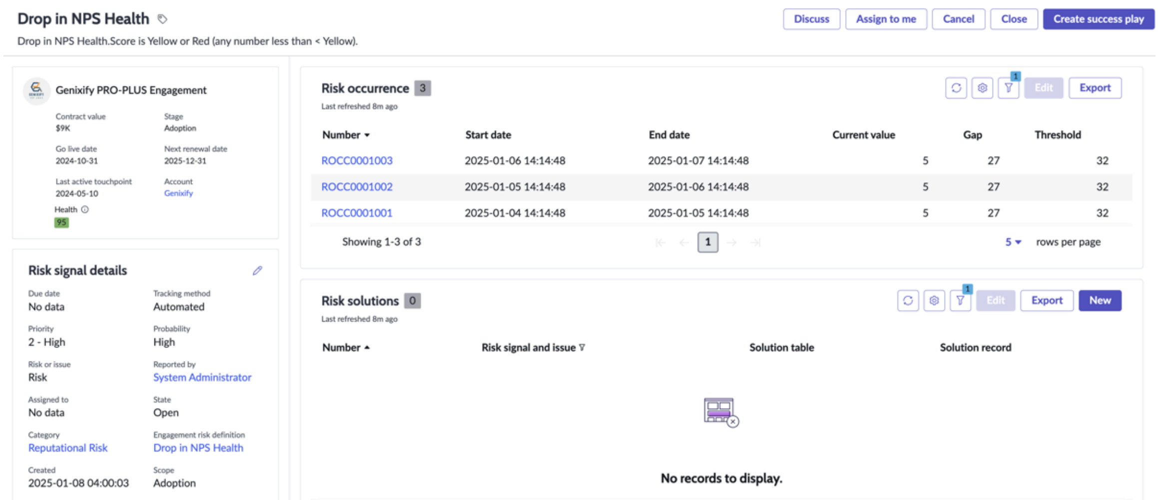
  Click the icon to drill down to the detailed record page.

Risk and issues page

This page provides detailed information about a risk signal including risk occurrences, threshold values, and risk solution.

To view this page, follow these steps:

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Risks and Issues** and click **Number** column to open the record. You can also navigate to this page from the Risk portfolio dashboard.



You can see the following details:

- Engagement details: This section shows the details of the engagement for which the risk signal has been generated. It includes the Contract value, Stage, Next Renewal date, Health, and so on.
- Risk signal details: The risk signal details including probability, tracking method, category, and so on. See Create a risk signal for details.
- Risk occurrence: List of risk occurrences based on the scheduled job. This includes the start and end dates on which the scheduled job was executed, the current value, threshold value, and the gap. Click on the link to drill down to the Risk Occurrence page.

The following options are available:

- Discuss: Click **Discuss** to start a sidebar discussion about this risk signal. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Create success play: See Create a success play
- Export: Click **Export** to export the risk occurrences or solutions to an Excel file.

Engagement home page

This page provides detailed information of an engagement including internal and external stakeholders, upcoming touchpoints, initiatives, and blueprints.

To view this page, follow these steps:

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Engagements** and click **Number** column to open the engagement record. You can also navigate to this page from the Success portfolio dashboard.

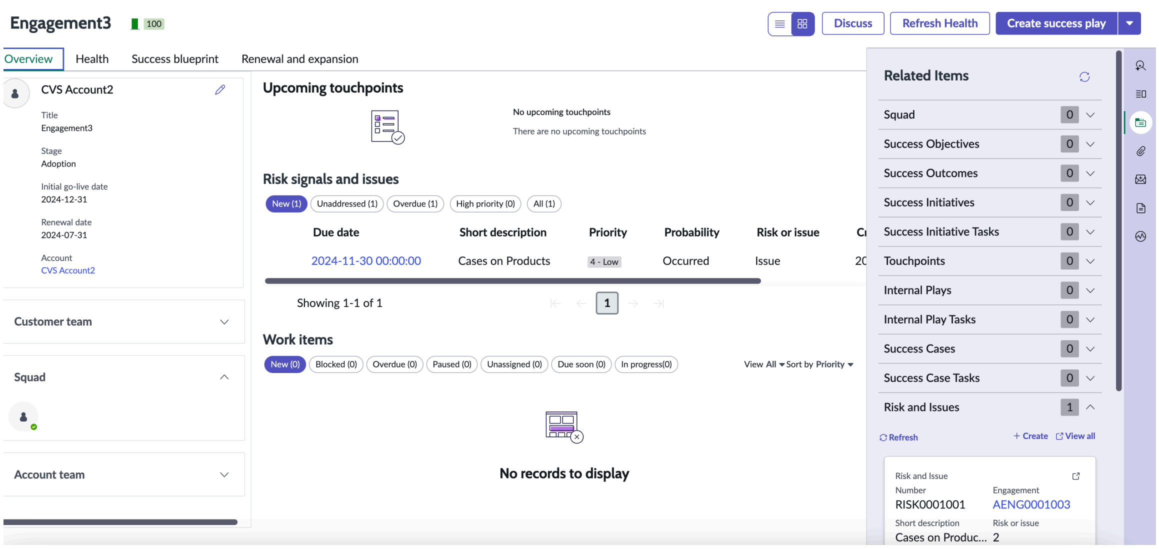
The following options are available:

- Discuss: Click **Discuss** to start a sidebar discussion about this engagement. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this engagement. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.

- Refresh Health: Click this option to update the health score for this engagement.
- Create success play: See Create a success play
- Internal play: See Create an internal play playbook.
- Risk signal: See Create a risk signal.
- Success case: See Create a success case playbook.
- Touchpoint: See Create a touchpoint.

The Engagement record page contains the following tabs:

- Overview
- Health
- Success blueprint
- Renewal and expansion



Overview (engagement)

This tab provides a high level overview of the engagement. It includes the following details:

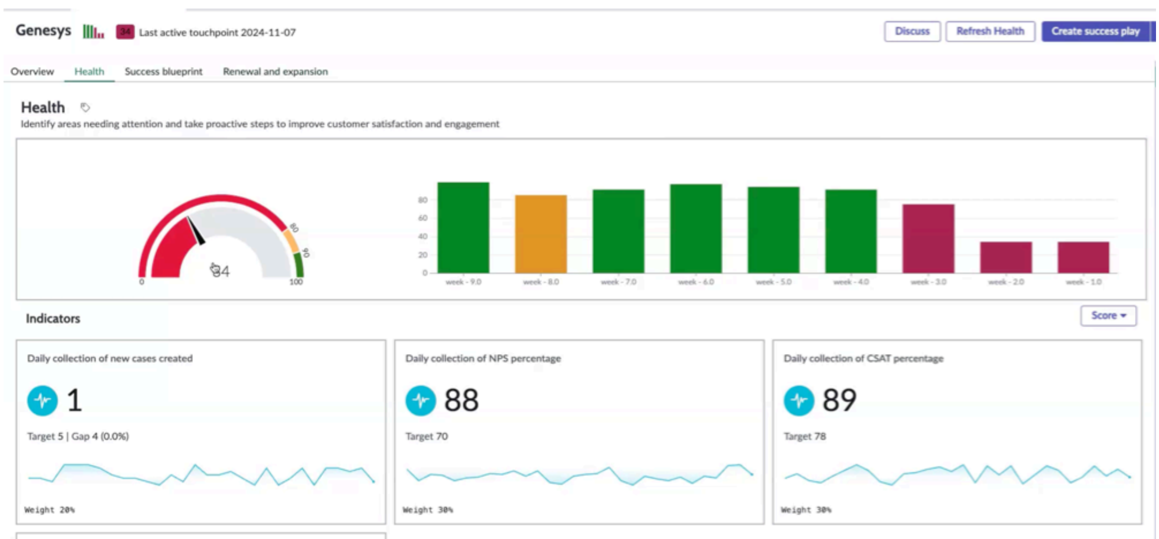
- Header: The header section shows the health score of the engagement over the last 6 weeks and the last active touchpoint.
- Engagement details: Shows the contract value, engagement stage, go-live date, account with which it is associated, and the renewal date. Click the Edit icon to modify the engagement details and click **Save**.
- Customer team: Shows the key customer contact you have specified for this engagement. This information is also displayed in the Related Items section under Applicable Customer Teams.
- Squad: Shows the squad members associated with the engagement.
- Account team: The team members handling the account. This information is also displayed in the Related Items section under Applicable Account Teams.
- Upcoming touchpoints: Shows any upcoming touchpoints for this engagement. Click the link to drill down to the Touchpoint record page.
- Risk signals and issues: Shows any new, overdue, high priority, or unaddressed risks or issues.

- Work items: This section shows the activities and tasks associated with this engagement. You can sort the list by Priority or Due Date. You can view all the work items or view items belonging to a specific category by selecting one of the following filters from the **View** drop down list:
  - Internal plays
  - Internal play tasks
  - Success case
  - Success initiative
  - Success task

  To filter this list further, click one of the work items filters like New, Blocked, and so on to view specific items in the list.

Health

In this tab, you can see the current health score and the health of the engagement over the last twelve weeks. This helps identify gaps and issues that need attention. Click **Refresh Health** to view the updated health score.



In the Indicators section, you will see the metrics used to calculate the health score for this engagement. See Setup the engagement health definition. For each metric, you will the target score, weight, and gap percentage. Click the **Sort by** option to sort the metrics listed by score, weight, and gap.

Success blueprint

In this tab, you can view the success objectives associated with this engagement. You can view the high level details of each success objective including Due date, Start date, Key contact, Assigned to, and Products. If the success blueprint has not been defined, click **Create success blueprint**. See Create a success blueprint for instructions on creating a success blueprint. You can do the following:

- Sort by: You can sort the list by Due date of the objectives.
- View by State: Select one of the states from the drop down list. This can be:
  - All
  - In Progress
  - Paused

  - Closed
  - New
  - Canceled
- Click the icon to drill down to the Success objective record page.
- View initiative roadmap: Click this link to view the success initiative roadmap which the engagement details including the current health, stage, and the next renewal date for the engagement.

Renewal and expansion

In this tab you can view a list of all active contracts associated with this engagement. You can view the high level details of each contract and click the link to drill down to the Contract page.

Success objective record page

This page provides a detailed view of the success objective and its related outcomes and initiatives as defined in the success blueprint.

To view this page, follow these steps:

1. Login as a user with the sn_acct_lc.ale_success_agent role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Engagements**, and open an engagement.
4. Select the **Success blueprint** tab and click the icon to open the page.

This page includes the following sections:

- Header: This section shows the progress, priority, state, the driver category, the number of days left for this objective to be completed, and the planned end date.
- Success outcomes: The success outcomes associated with the objective. For each objective, you can see the status, value realized (the current value based on the percentage of the target achieved), and the number of days left for this outcome to be achieved. Select a success outcome to view the success initiatives associated with it. Click **Edit** to drill down to the Success Outcome page.
- Success initiatives: The list of initiatives associated with the selected success outcome. The subject, progress, and the number of days remaining are displayed. Click the **Number** column to drill down to the Success Initiative record page.

Success outcome record page

A success outcome refers to the result or goal that is used to measure the achievement of a success objective.

When you create a success blueprint for an engagement, you can define success objectives and outcomes for each objective. See Create a success blueprint for details. You can view this page either by navigating from the Engagement record page or by following these steps:

1. Login as a user with the sn_acct_lc.ale_success_agent role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Outcomes** and click **Number** column to open the success outcome record.

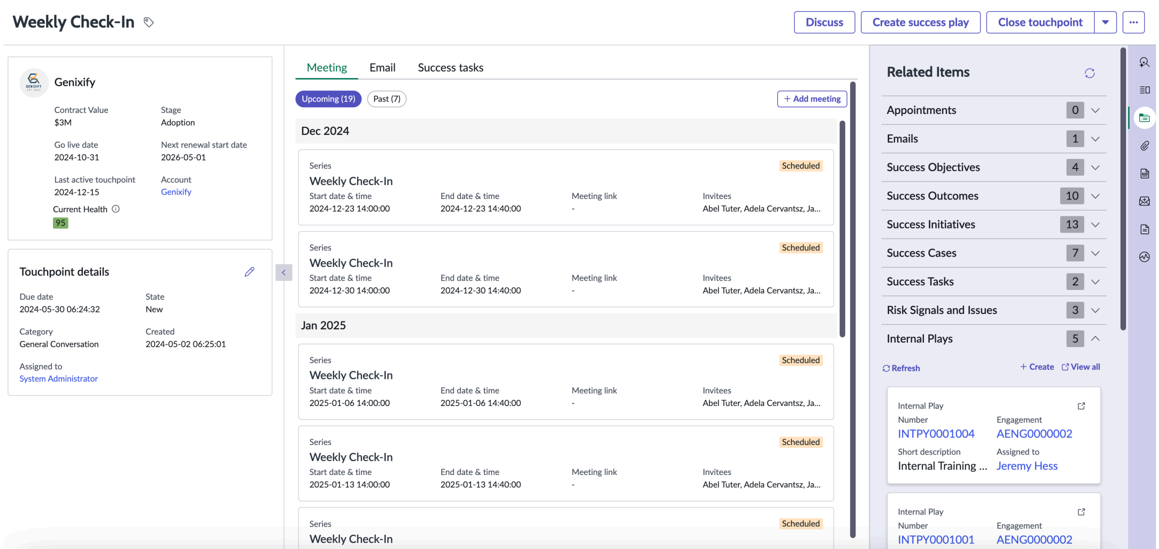
This page contains the following tabs:

- Details: See Create a success outcome for a detailed description of the fields.
- Success Initiatives: Shows the list of success initiatives associated with this outcome.
- Approvers: Shows the list of approvers for this outcome.
- Risk Signals and Issues: Lists any risk signals or issues associated with this outcome.

Touchpoint home page

During the engagement lifecycle, customer success agents schedule regular touchpoints with customers to evaluate progress, provide feedback, and offer guidance.

Touchpoints enhance communication between customer success teams and customer throughout the engagement lifecycle. Regular touchpoints ensures that the internal and external teams are aligned on the objectives and outcomes of the engagement.



The following options are available:

- Discuss: Click **Discuss** to start a sidebar discussion about this touchpoint. In the popup window, select the participants who need to participate in the discussion, enter a brief message, and click **Start discussion**. A window appears with a link to the record for this touchpoint. Click **Open record** and start the discussion. When the discussion has been completed, you can see the details in the Activity stream.
- Create success play: See Create a success play.
- Close touchpoint: Select **Close touchpoint** option from the More Actions drop down menu. You are prompted to enter the mandatory fields. Click the **Edit** icon in the Touchpoint details panel, enter the mandatory fields and click **Save**. Click **Close touchpoint** after filling in the mandatory fields. Select the Closure code and Close notes and click **Close** to close the touchpoint.
- Cancel touchpoint: Select the **Cancel touchpoint** option from the More Actions drop down menu. The Closure code is automatically updated to reflect the State change. Enter the Close notes and click **Cancel**. If all other mandatory fields have been filled in, you will see a confirmation message indicating that the touchpoint has been canceled. If any mandatory fields have not been filled in, click the **Edit** icon in the Touchpoint details panel, enter the mandatory fields and click **Save** to cancel the touchpoint.

The Touchpoint home page contains the following tabs:

- Meetings
- Emails
- Success tasks

On the left pane, you can see the details of the account with which the touchpoint is associated. The details of the Touchpoint record are also displayed. Click on the pencil icon to modify the details and click **Save** to update the record.

Meetings

This tab shows a list of upcoming touchpoint meetings and the ones that have already occurred. For each meeting listed on the page, the title, start and end date, meeting link, list of invitees, and the meeting state is displayed. Click **Add meeting** to schedule a new meeting. Enter the following details:

Field	Description
Meeting subject	Enter a description for the meeting.
State	This can be: • Draft: A newly created meeting is in a Draft state. It will remain in this state till the status is updated to Scheduled. You can add invitees, meeting cadence, location, and other information when the status is updated. • Scheduled: A meeting in a Scheduled state is set for a specific date and time and with a list of invitees. A scheduled meeting can either be a recurring meeting or a one-time occurrence. • Completed: A meeting that has already been completed. Meetings in this state can be saved or recorded if required.
Meeting type	This field appears only when the State is set to Scheduled. This can be: • Ad-hoc • Weekly Status • QBR • Renewal
Start date & time	Enter the start date and time on which the meeting should be scheduled. The start date must be earlier than the end date.
End date & time	Enter the end date and time for the meeting. • The meeting duration cannot exceed 24 hours. • The Repeat until date must be later than the End date.
Invitees	Select the invitees for the meeting from the drop down list.
Cadence	Specify the cadence for the meeting. This can be:

Field	Description
	• Biweekly • Daily • Monthly • Quarterly • Weekly
Repeat until	This field appears only if you select a value in the Cadence field. Specify the date till which the meeting cadence should be repeated. **Note:** By default, you can set up the meeting series for maximum period of 365 days. You can modify this value in the *sn_meeting_mgmt.meeting_series_repeat_limit* system property.
Virtual meeting	Select this checkbox to enable virtual meetings.
Video software	Select the virtual meeting provider software such as Zoom and Google Meet. **Note:** To enable virtual meetings, you must setup Zoom integration on your ServiceNow instance and update the user account details in the *sn_acct_lc.zoom_integration_user_id* system property.
Meeting link	This field is automatically populated based on your selection in the Video software field.
Locations	Select one or more locations from the drop down list.
Agenda	Enter the agenda for the meeting.
Internal notes	Enter any internal notes for the meeting.
Attachments	Click **Add file** to upload one or more attachments with the meeting invite.

Click **Create** to save and create the meeting. The scheduled meeting is displayed in the Meetings page. An email invite is sent to all the invitees for the meeting. Based on the Cadence you specified, the scheduled meeting series will appear on the Meetings page.

Note:

- Meeting invites are sent only for meetings in the **Scheduled** state.
- If a meeting or a meeting series is canceled, the email indicating that it is canceled is sent to the meeting invitees.
- If the meeting details such as the time or location are changed, an updated invite is automatically sent to all the meeting invitees.
- The Start and End dates for a meeting series should not be later than `Repeat until` date.
- If a meeting series is extended, new meeting occurrences must be scheduled for future dates. Any updates to a meeting series impacts only upcoming meetings.
- If a meeting series is rescheduled to an earlier date, all future occurrences will be canceled.
- When a meeting is marked as completed or notes are updated, meeting notes are sent to all participants.
- A single meeting occurrence can be canceled.

You can do the following:

- Click on a meeting to modify the details. If the meeting is part of a series, you can either edit one of the occurrences or click **Edit series** to update the entire meeting series.
- Click **Cancel occurrence** to cancel the selected meeting or click **Cancel series** to cancel the entire meeting series.
- Click **Save** to update the meeting or meeting series.
- To close a touchpoint, select **Close touchpoint** and enter the Closure code and the Close notes. Select one of the closure codes and click **Close**.
  - Addressed
  - Unaddressed
  - Canceled
- To cancel a touchpoint, select **Cancel touchpoint**. The Closure code is set to Canceled and the State field is updated. When a touchpoint is canceled:
  - Existing scheduled meetings are still available, but you cannot schedule any new meetings.
  - Emails and success tasks cannot be added for the closed or canceled touchpoint.

Emails

In this tab, the customer success agent can send email to the users specified in the Contact field in the Touchpoint. By default, the email header will be auto populated with the email address of the Contact and the subject of the account.

You can:

- Click the `Expand email` icon to expand the email. You add or delete the email ids and update the subject if required.
- Click the `Flag` icon to mark this email as important.
- Click the `Open draft in a tab` icon to view the email in a new tab. Click the `View drafts` icon and then **Manage draft** to view draft versions of the email. Select a draft from the list, click **Apply** and use it for your email.

- While writing an email, if you want to display the last saved draft in the Compose section, you must setup the Email composer (mini). See Email composer (mini) UIB setup for details.
- Select the Touchpoint Email Template in the right panel and click **Apply Template**. Your email will be formatted as per the touchpoint template that you have applied.
- Click **Attach file**. You can attach a file either from your computer or from the touchpoint record. Select the file to be attached and click **Add** to attach the file with your email.

Click **Send email**. Navigate to the *`Emails`* tab to see the email you have sent. You can also view the list of emails sorted in descending order of sent date. You can use the Search option to view emails meeting a specific criteria, filter the list by the type of emails, flagged emails, and create additional filter sets. You can also view the sent and received emails in the Emails under the Related Items section.

Success tasks

You can view the success tasks associated with this touchpoint.

1. Click **New** to create a new success task for this touchpoint. The Create new success task page is displayed. See Create a success case task for details.
2. Enter the details on this page and click **Save**. The newly created success task now appears on the *`Success tasks`* page.

Touchpoint planner

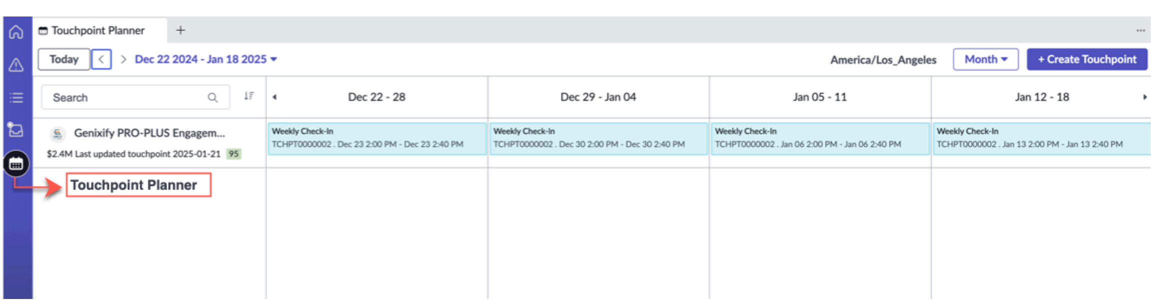
The touchpoint planner shows a calendar view of different touchpoints across all accounts associated with the customer success manager.

Note:

- Engagements can be viewed by the engagement account manager, customer success manager, or squad member associated with the engagement.
- Touchpoints can be viewed by the engagement account manager, customer success manager, or squad member assigned to the touchpoint.
- Meeting can be viewed by the engagement account manager, customer success manager, meeting organizer, or squad member assigned to the touchpoint.

The touchpoint planner provides a calendar view of touchpoints organized by account engagement and the type of touchpoint, priority and status. To view the Touchpoint planner, follow these steps:

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**and click the **Touchpoint planner** icon on the left navigation pane.



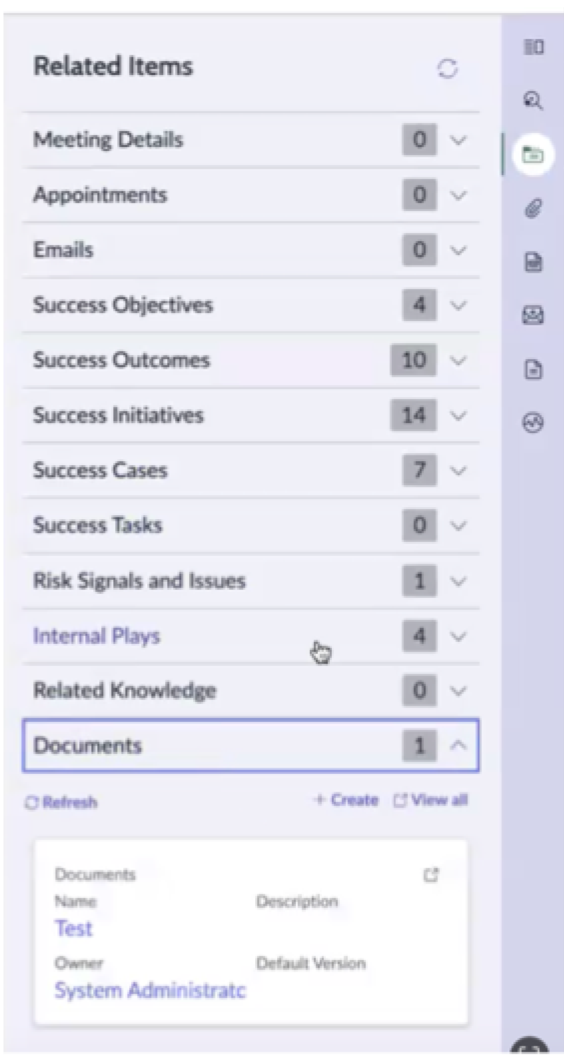
You can do the following:

- Enter a criteria in the Search field to view touchpoints and meetings that match the criteria.
- Click the icon to sort the list either by Contract value, Health score, or Last updated touchpoints.
- Click **Today** to view the list of touchpoints and meetings that have been scheduled for today.
- Select a date period to view the schedule for that period.
- Select **Week** or **Month** option to view the schedule for the week or for month as required.
- The time zone shows the current time zone of the logged in user.
- Click **Create Touchpoint** to create a new touchpoint. See Create a touchpoint for details.

Related items component in customer success records

The related items component provides access to related lists associated with engagements, touchpoints, success cases, and internal plays

The related items component uses an expandable accordion format. You can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.



Related lists include the following actions:

- Create: opens a blank record in a sub tab that the agent can use to create a new item.
- View all: opens a list of records in a sub tab.
- Show more: is displayed for lists that have more than five items.

Several related lists including success objectives, outcomes, initiatives, success cases, and documents are displayed on the engagement, touchpoint, success case, and internal play pages.

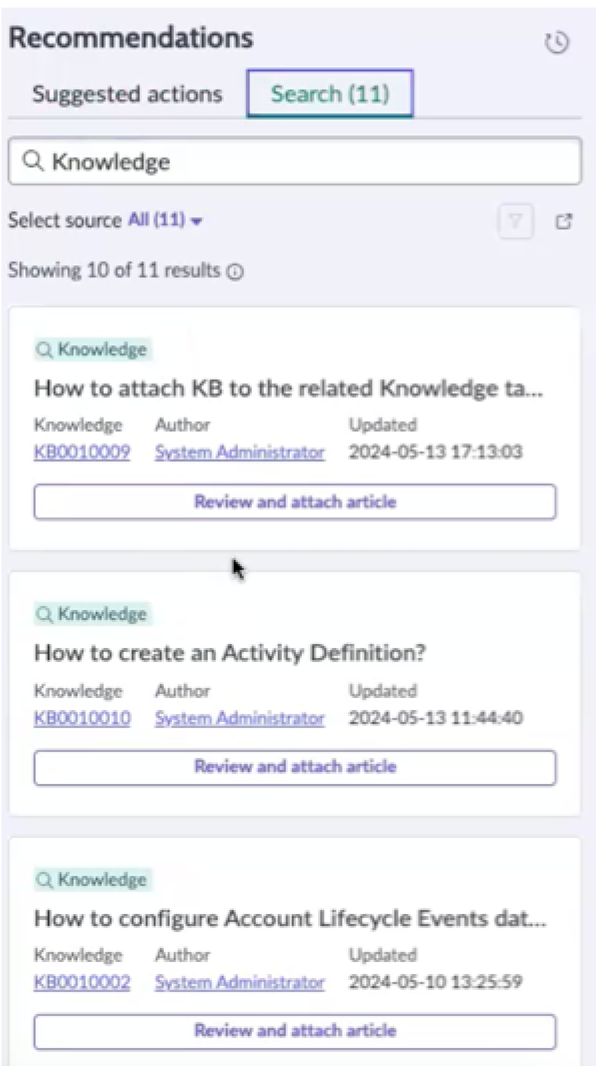
Note: The *Documents* related items is displayed only if you have installed the `com.snc.platform_document_management` plugin.

Using AI search with Recommended Actions

Use AI search with Recommended Actions to create contexts and search for relevant records.

Note: The AI search is available only if you have configured the Recommended Actions application to display relevant results for the search query. See Set up Recommended Actions for account onboarding for details.

AI search results and genius results are displayed in the Search tab of the Recommended Actions component in the contextual side panel. Agents can initiate actions from the search cards directly to resolve an issue.



The search results from the configured search sources are displayed in the form of cards. These cards are previews of search records. You can select the card to view the record details or directly take actions through the cards. The most relevant answers are displayed as top results in the form of genius result cards.

Search is available for the following:

- Account onboarding cases and case tasks
- Success cases and success case tasks
- Engagements
- Touchpoints
- Risks and issues
- Success initiatives
- Success objectives
- Success outcomes

For more details on how to enable AI search and create search contexts, see Configuring AI search in Recommended Actions.

Create an opportunity in Microsoft Dynamics CRM

Create a renewal opportunity in the Microsoft Dynamics CRM platform from your ServiceNow instance.

Before you begin

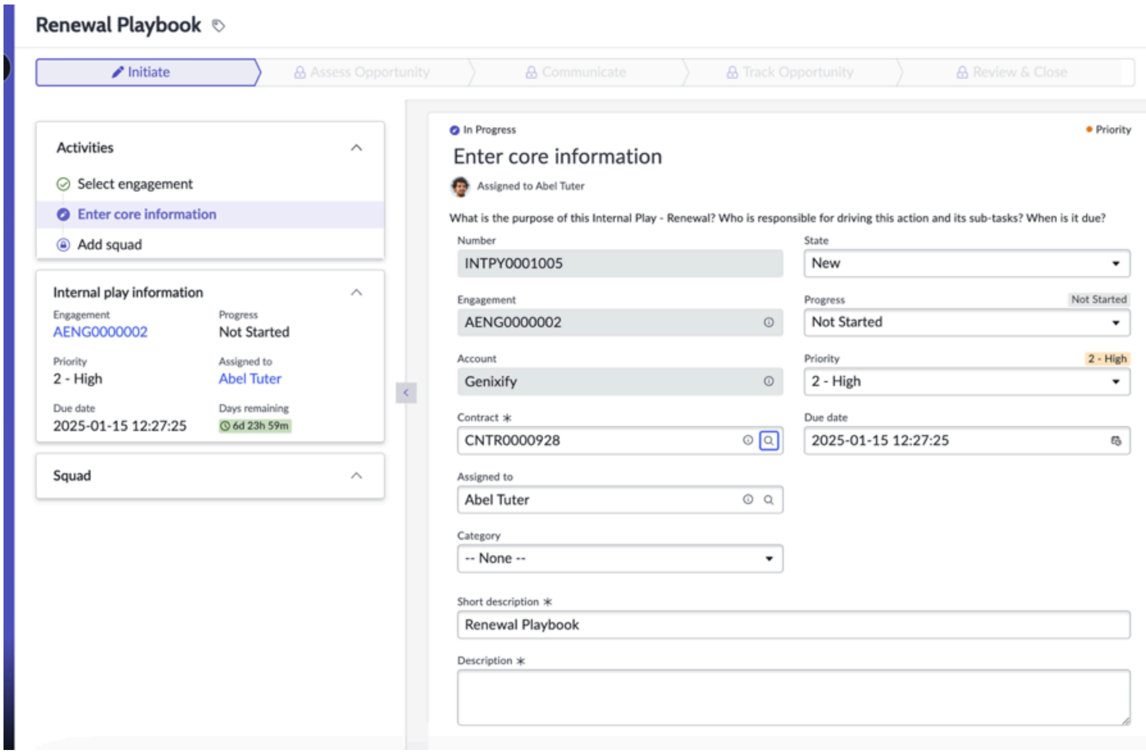
Role required: sn_acct_lc.ale_success_agent

About this task

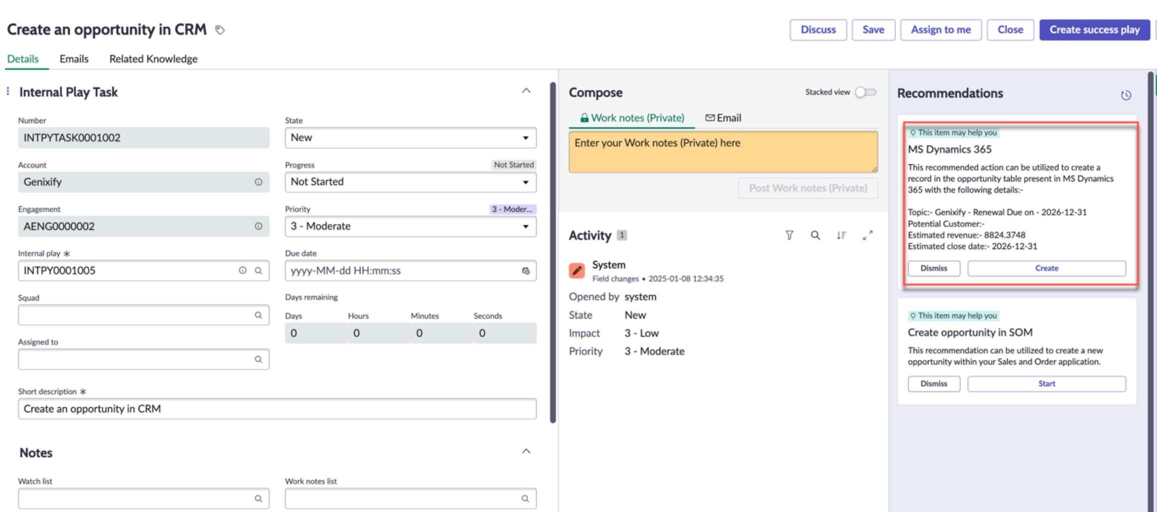
Customer success managers can create renewal opportunities based on contract expiration dates and identify any potential risks.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to **Customer Success** > **All Engagements** and open an engagement.
3. Click **Create Success Play**.
4. Select **Success Support** category and click the **Simple Renewal Play** card.
5. In the Create Success Play form, specify the Due Date, Assigned to, and Priority and click **Finish**.
   You will see a message that an internal play has been created.
6. Navigate to **Customer Success** > **All Internal Plays** and open the renewal playbook that was created.



7. In the Enter core information page, select the contract for which the renewal opportunity is to be created, enter a description and click **Mark complete**.
8. **Optional:** In the Add squad page, select one or more squad members and click **Mark complete**.
9. **Optional:** In the Assess Opportunity stage, click **Mark read** in the View contract record page to proceed to the next step.
10. **Optional:** In the Assess engagement page, enter any actions or steps required and click **Send and continue** to proceed to the next stage.
11. **Optional:** In the Communicate stage, click **Send email** to go to the next stage.
12. In the Create opportunity page, click **Open record**.
You can see the recommended action for Microsoft Dynamics CRM displayed in the right panel. The details of the account associated with the engagement and the contract information is displayed. Click the **History** icon to see a log of previous recommended actions.



13. Click **Create**.
    You will see a message indicating that the opportunity record has been created. You can login to the Microsoft Dynamics CRM platform to view this record.

    Note: You can create the record only if you have defined the mappings in the *DynamicsCRMMappingConstants* script include. See Integrating with Microsoft Dynamics CRM for details. If the mappings have not been configured, you will see the recommended action but the **Create** option will not work.

Create a task in Microsoft Dynamics CRM

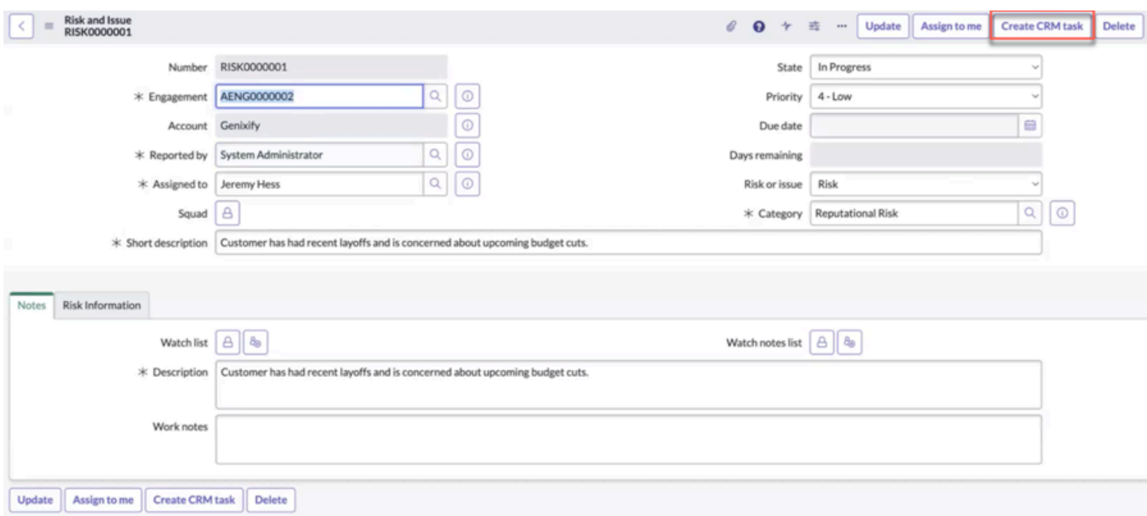
Create a task in the Microsoft Dynamics CRM platform from your ServiceNow instance and receive updates to the task in your ServiceNow instance.

Before you begin

Role required: sn_acct_lc.ale_success_agent

Procedure

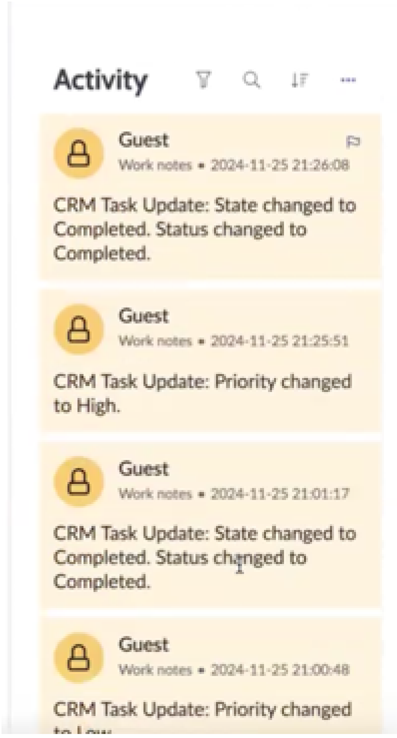
1. Navigate to **All** > **Customer Success** > **All Risks and Issues**.
2. Open the risk record for which you want to create a task.
3. If you have configured the **Create CRM task** option, you can see it on the Risk and Issue page. See Integrating with Microsoft Dynamics CRM for details on configuring this option.



4. Select **Create CRM task**.
   A new task is created in the Microsoft Dynamics CRM platform. The details of the account, engagement, and contracts associated with the risk record are displayed.

   Note: If you modify or update Priority or Status fields in the task that was created, the updates are displayed as work notes in your ServiceNow instance.

5. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the **List** icon.
6. Navigate to **Customer Success** > **All Risks and Issues** and open a risk record.
   You can see the work notes that show how the task was updated.



Work notes are displayed if you have configured:

- The Microsoft Dynamics CRM update mechanism (so that Microsoft Dynamics CRM can access the Microsoft Dynamics spoke webhook) when the configured event occurs in the task table. See Set up Microsoft Dynamics CRM spoke for details.
- Microsoft Dynamics CRM spoke (see Microsoft Dynamics CRM Spoke).
  - Decision table as per the requirement
  - Webhook (Dynamics Webhook Callbacks)
- Customer Success Management application has been configured for Microsoft Dynamics CRM integration. See Integrating with Microsoft Dynamics CRM for details.

Customer Success Management reference

Reference topics provide additional information about Customer Success Management application.

This section covers information about the data model, installed components, and domain separation.

Domain separation and Customer Success Management

Domain separation is supported for Customer Success Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Customer Success Management domain separation overview

With the Customer Success Management application, you can create onboarding cases and related onboarding case tasks, track objectives, outcomes, and define documented plans to ensure success. The account onboarding case and related tasks support domain separation at the account level. Engagements, objectives, outcomes , initiatives, success cases, risk signals and internal plays are domain separated at the account level.

How domain separation works in Customer Success Management

- Account onboarding cases, account lifecycle tasks, and account lifecycle import case tasks are domain separated using the account domain.
- All other staging tables used for the Data Import are not domain separated.
- All customer success tables are domain separated.

Setting up domain separation in Customer Success Management

Domain separation for Customer Success Management requires the domain separation plugin and enabling the csm_auto_account_domain_generation domain separation property. For more information on setting up domain separation, see Domain separation and Customer Service Management.

Domain separated tables

- Account onboarding case [sn_acct_lc_onb_case]
- Account lifecycle import task [sn_ti_core_imp_task]
- Account lifecycle task [sn_ti_core_task]
- Engagement [sn_acct_lc_engagement]
- Success objective [sn_acct_lc_success_objective]
- Success outcome [sn_acct_lc_success_outcome]
- Success initiative [sn_acct_lc_success_initiative]
- Success case [sn_acct_lc_success_case]
- Success task [sn_acct_lc_success_task]
- Touchpoint [sn_acct_lc_touchpoint]
- Internal play [sn_acct_lc_internal_play]
- Internal play task [sn_acct_lc_internal_play_task]

Related topics

Domain separation for service providers

Account onboarding users and roles

An overview of the tasks that can be performed by the different Customer Success Management users and their required roles and user criteria.

Users and roles

Users	Description	Roles
Onboarding manager	Responsible for the end-to-end workflow from onboarding customer until account go-live.	sn_acct_lc.agent
Foundational data analyst	Subject matter expert who ensures that the data being imported in the correct format and meets the quality standards required for publishing.	sn_acct_lc.agent
ServiceNow admin/ developer	Responsible for configuring playbook, case type, emails, transform maps, and other necessary components.	admin
Onboarding point of contact (customer)	Primary customer contact responsible for managing the customer team involved in the onboarding process.	sn_customerservice.customer_admin
ServiceNow admin/ developer (customer)	Responsible for the managing customer's ServiceNow instance and setting up the Service Exchange application.	sn_customerservice.customer_manager
Foundational Data SME (Subject matter expert)	Responsible for providing necessary information like contact information, and locations. Ensures that the data meets the format required by the provider organization.	sn_customerservice.customer

Customer success roles

Roles added with Customer Success Management.

Role title	Description	Contains roles
sn_ti_core.delete	Role for delete access on records of Technology case table and ALE choice	

Role title	Description	Contains roles
sn_ti_core.admin	Admin access on records of Technology case table and ALE choice.	
sn_acct_lc.ale_success_viewer	The success viewer role provides authorized users the ability to view engagements, objectives, outcomes, initiatives, internal plays, success cases, touchpoints, and any related tasks within customer success.	
sn_acct_lc.ale_success_agent	Allows read, create, and update access to engagements, objectives, outcomes, initiatives, internal plays, success cases, touchpoints and any related tasks within customer success.	
sn_acct_lc.success_play_admin	Allows create, update and delete access to workflow definition records as well as read, write and update access for entities within customer success.	
sn_acct_lc.ale_success_customer	Customer role to interact with customer success team members from the provider organization.	
sn_acct_lc.engagement_admin	Admin access to the Engagement (sn_acct_lc_engagement) table.	• sn_acct_lc.engagement_write • sn_acct_lc.engagement_delete • sn_acct_lc.engagement_read
sn_acct_lc.success_objective_admin	Admin access to Success Objective (sn_acct_lc_success_objective) table.	• sn_acct_lc.success_objective_write • sn_acct_lc.success_objective_delete • sn_acct_lc.success_objective_read
sn_acct_lc.success_outcome_admin	Admin access to Success Outcome (sn_acct_lc_success_outcome) table.	• sn_acct_lc.success_outcome_write • sn_acct_lc.success_outcome_delete • sn_acct_lc.success_outcome_read

Role title	Description	Contains roles
sn_acct_lc.success_initiative_admin	Admin access to Success Initiative (sn_acct_lc_success_initiative) table.	• sn_acct_lc.success_initiative_write • sn_acct_lc.success_initiative_delete • sn_acct_lc.success_initiative_read
sn_acct_lc.success_case_admin	Admin access to Success Case (sn_acct_lc_success_case) table.	• sn_acct_lc.success_case_write • sn_acct_lc.success_case_delete • sn_acct_lc.success_case_read
sn_acct_lc.touchpoint_admin	Admin access to Touchpoint (sn_acct_lc_touchpoint) table.	• sn_acct_lc.touchpoint_write • sn_acct_lc.touchpoint_delete • sn_acct_lc.touchpoint_read
sn_acct_lc.success_task_admin	Admin access to Success Task (sn_acct_lc_success_task) table.	• sn_acct_lc.success_task_write • sn_acct_lc.success_task_delete • sn_acct_lc.success_task_read
sn_acct_lc.internal_play_admin	Admin access to Internal Play (sn_acct_lc.internal_play) table.	• sn_acct_lc.internal_play_write • sn_acct_lc.internal_play_delete • sn_acct_lc.internal_play_read
sn_acct_lc.internal_play_task_admin	Admin access to Internal Play Task (sn_acct_lc.internal_play_task) table.	• sn_acct_lc.internal_play_task_write • sn_acct_lc.internal_play_task_delete • sn_acct_lc.internal_play_task_read
sn_acct_lc.risk_signal_issue_admin	Admin access to the risk signal (sn_acct_lc.risk_signal_issue) table.	• sn_acct_lc.risk_signal_issue_write • sn_acct_lc.risk_signal_issue_delete • sn_acct_lc.risk_signal_issue_read
sn_acct_lc.definition_record_admin	Admin access to the ALE Definition Record (sn_acct_lc_definition_record) table.	• sn_acct_lc.definition_record_write • sn_acct_lc.definition_record_delete • sn_acct_lc.definition_record_read
sn_acct_lc.success_launcher_notifier_admin	Admin access to the Success Launcher Notifier (sn_acct_lc_success_launcher_notifier) table.	• sn_acct_lc.success_launcher_notifier_write • sn_acct_lc.success_launcher_notifier_delete • sn_acct_lc.success_launcher_notifier_read

Role title	Description	Contains roles
sn_acct_lc.risk_signal_solution_admin	**Admin** access for the Risk issue solution (sn_acct_lc_risk_signal_solution_relationship) table.	• sn_acct_lc.risk_signal_solution_write • sn_acct_lc.risk_signal_solution_delete • sn_acct_lc.risk_signal_solution_read
sn_acct_lc.squad_member_admin	Admin access to the Squad Member (sn_acct_lc_squad_member) table.	• sn_acct_lc.squad_member_write • sn_acct_lc.squad_member_delete • sn_acct_lc.squad_member_read
sn_acct_lc.engagement_contract_admin	Admin access to the Engagement contract (sn_acct_lc_engagement_contract_relationship) table.	• sn_acct_lc.engagement_contract_write • sn_acct_lc.engagement_contract_delete • sn_acct_lc.engagement_contract_read
sn_ti_core_ale_choice	Read/Report View	Provides read and report view access to sn_ti_core_read role
sn_ti_core_ale_choice	Create/Write	Provides create and write access to sn_ti_core_write role
sn_ti_core_ale_choice	Delete	Provides delete access to sn_ti_core_delete role
sn_acct_lc_engagement	Delete	Provides delete access to sn_acct_lc.engagement_delete role
sn_acct_lc_success_objective	Read/Report View	Provides read and report view access to sn_acct_lc.success_objective_read role
sn_acct_lc_success_objective	Create/Write	Provides create and write access to sn_acct_lc.success_objective_write role
sn_acct_lc_success_objective	Delete	Provides delete access to sn_acct_lc.success_objective_delete role
sn_acct_lc_success_outcome	Read/Report View	Provides read and report view access to sn_acct_lc.success_outcome_read role
sn_acct_lc_success_outcome	Create/Write	Provides create and write access to sn_acct_lc.success_outcome_write role
sn_acct_lc_success_outcome	Delete	Provides delete access to sn_acct_lc.success_outcome_delete role

Role title	Description	Contains roles
sn_acct_lc_success_initiative	Read/Report View	Provides read and report view access to sn_acct_lc.success_initiative_read role
sn_acct_lc_success_initiative	Create/Write	Provides create and write access to sn_acct_lc.success_initiative_write role
sn_acct_lc_success_initiative	Delete	Provides delete access to sn_acct_lc.success_initiative_delete role
sn_acct_lc_success_case	Read/Report View	Provides read and report view access to sn_acct_lc.success_case_read role
sn_acct_lc_success_case	Create/Write	Provides create and write access to sn_acct_lc.success_case_write role
sn_acct_lc_success_case	Delete	Provides delete access to sn_acct_lc.success_case_delete role
sn_acct_lc_touchpoint	Read/Report View	Provides read and report view access to sn_acct_lc.touchpoint_read role
sn_acct_lc_touchpoint	Create/Write	Provides create and write access to sn_acct_lc.touchpoint_write role
sn_acct_lc_touchpoint	Delete	Provides delete access to sn_acct_lc.touchpoint_delete role
sn_acct_lc_success_task	Read/Report View	Provides read and report view access to sn_acct_lc.success_task_read role
sn_acct_lc_success_task	Create/Write	Provides create and write access to sn_acct_lc.success_task_write role
sn_acct_lc_success_task	Delete	Provides delete access to sn_acct_lc.success_task_delete role
sn_acct_lc_internal_play	Read/Report View	Provides read and report view access to sn_acct_lc.internal_play_read role

Role title	Description	Contains roles
sn_acct_lc_internal_play	Create/Write	Provides create and write access to sn_acct_lc.internal_play_write role
sn_acct_lc_internal_play	Delete	Provides delete access to sn_acct_lc.internal_play_delete role
sn_acct_lc_internal_play_task	Read/Report View	Provides read and report view access to sn_acct_lc.internal_play_task_read role
sn_acct_lc_internal_play_task	Create/Write	Provides create and write access to sn_acct_lc.internal_play_task_write role
sn_acct_lc_internal_play_task	Delete	Provides delete access to sn_acct_lc.internal_play_task_delete role
sn_acct_lc_risk_signal_issue	Read/Report View	Provides read and report view access to sn_acct_lc.risk_signal_issue_read role
sn_acct_lc_risk_signal_issue	Create/Write	Provides create and write access to sn_acct_lc.risk_signal_issue_write role
sn_acct_lc_risk_signal_issue	Delete	Provides delete access to sn_acct_lc.risk_signal_issue_delete role
sn_acct_lc_definition_record	Read/Report View	Provides read and report view access to sn_acct_lc.definition_record_read role
sn_acct_lc_definition_record	Create/Write	Provides create and write access to sn_acct_lc.definition_record_write role
sn_acct_lc_definition_record	Delete	Provides delete access to sn_acct_lc.definition_record_delete role
sn_acct_lc_success_launcher_notifier	Read/Report View	Provides read and report view access to sn_acct_lc.success_launcher_notifier_read role
sn_acct_lc_success_launcher_notifier	Create/Write	Provides create and write access to sn_acct_lc.success_launcher_notifier_write role

Role title	Description	Contains roles
sn_acct_lc_success_launcher_notifier	Delete	Provides delete access to sn_acct_lc.success_launcher_notifier_delete role
sn_acct_lc_engagement_contract_relationship	Read/Report View	Provides read and report view access to sn_acct_lc.engagement_contract_relationship_ role
sn_acct_lc_engagement_contract_relationship	Create/Write	Provides create and write access to sn_acct_lc.engagement_contract_relationship_ role
sn_acct_lc_engagement_contract_relationship	Delete	Provides delete access to sn_acct_lc.engagement_contract_relationship_ role
sn_acct_lc_squad_member	Read/Report View	Provides read and report view access to sn_acct_lc.squad_member_read role
sn_acct_lc_squad_member	Create/Write	Provides create and write access to sn_acct_lc.squad_member_write role
sn_acct_lc_squad_member	Delete	Provides delete access to sn_acct_lc.squad_member_delete role
sn_acct_lc_risk_signal_solution_relationship	Read/Report View	Provides read and report view access to risk_signal_solution_relationship_read role
sn_acct_lc_risk_signal_solution_relationship	Create/Write	Provides create and write access to risk_signal_solution_relationship_write role
sn_acct_lc_risk_signal_solution_relationship	Delete	Provides delete access to risk_signal_solution_relationship_delete role
sn_acct_lc_data_validation_assist	create	Allow create access on records in sn_acct_lc_data_validation_assist, for users with role sn_acct_lc.data_validation_assist_create
sn_acct_lc_data_validation_assist	read	Allow read access on records in sn_acct_lc_data_validation_assist, for users with role sn_acct_lc.data_validation_assist_read
sn_acct_lc_data_validation_assist	report_view	Allow report_view access on records in

Role title	Description	Contains roles
		sn_acct_lc_data_validation_assist, for users with role sn_acct_lc.data_validation_assist_read
sn_acct_lc_data_validation_assist	delete	Allow write access on records in sn_acct_lc_data_validation_assist, for users with role sn_acct_lc.data_validation_assist_admin
sn_acct_lc_data_validation_assist	write	Allow write access on records in sn_acct_lc_data_validation_assist, for users with role sn_acct_lc.data_validation_assist_write
sn_acct_lc_onb_case.days_remaining	read	Allow read for days_remaining in sn_acct_lc_onb_case, for users with roles (sn_customerservice.customer, sn_acct_lc.agent).
sn_acct_lc_onb_case.go_live_date	read	Allow read for go_live_date in sn_acct_lc_onb_case, for users with roles (sn_acct_lc.agent, sn_customerservice.customer).
sn_acct_lc_onb_case.products	read	Allow read for products in sn_acct_lc_onb_case, for users with roles (sn_customerservice.customer, sn_acct_lc.agent).
sn_acct_lc_onb_case.stage	read	Allow read for stage in sn_acct_lc_onb_case, for users with roles (sn_customerservice.customer, sn_acct_lc.agent).
sn_ti_core_task.due_date	read	Allow read for due_date in sn_ti_core_task, for users with roles (sn_customerservice.customer, sn_ti_core.read).
sn_ti_core_task.days_remaining	read	Allow read for days_remaining in sn_ti_core_task, for users with roles (sn_ti_core.read, sn_customerservice.customer).
sn_ti_core_task.progress	read	Allow read for progress in sn_ti_core_task, for users with roles (sn_customerservice.customer, sn_ti_core.read).
sn_ti_core_task.company	read	Allow read for company in sn_ti_core_task,

Role title	Description	Contains roles
		for users with roles (sn_customerservice.customer, sn_ti_core.read).
sn_ti_core_task.priority	read	Allow read for priority in sn_ti_core_task, for users with roles (sn_customerservice.customer, sn_ti_core.read).
import_builder	create	Allow create access on records in import_builder, for users with role import_builder_create.
import_builder	write	Allow write access on records in import_builder, for users with role import_builder_write.
import_builder	read	Allow read access on records in import_builder, for users with role import_builder_read.
sn_acct_lc.agent	This is the onboarding agent role that includes permissions to access Customer Success Management tables and plugins.	• sn_acct_lc.ale_success_viewer • sn_acct_lc.risk_signal_issue_write • sn_acct_lc.risk_signal_solution_write • sn_acct_lc.squad_member_write

Customer success flows

This section includes the customer success flows.

Flow	Description
Ale Execute Flow and Send Notification	Parent flow that triggers the customer's subflow and send a notification.
Ale Execute Flow Action	Action that contains the script to trigger the subflow.
Advisory Session: Optimize Architecture	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Advisory Session: Strategy Assessment	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
ALE Attach Knowledge article - Service Bridge	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.

Flow	Description
Assessment: Quarterly NPS Survey and Review	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Create Risk Signal and Issue record	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Customer Experience Digital Transformation -Standard	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Customer Experience Digital Transformation Objective	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Decommission Legacy Costs	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Decommission Legacy Costs Objective	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Enable Business Velocity	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Get to Green play	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Internal Partner Implementation Review	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Product Implementation Reviews and Recommendations	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Product Proof of Concept	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Responsible Contact	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.

Flow	Description
Scheduled a Follow-Up	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.
Setup next Quarterly Business Review	Demo subflow: Run internal actions to help improve the overall engagement health with this customer. Follow the attached playbook to drive next steps and recommended actions.

Customer success business rules

This section includes the customer success business rules.

Business rule	Table	Description
Domain - Set Domain	Engagement	Sets the domain information.
Required fields for engagement	Engagement	Validates required fields.
State is closed or canceled	Engagement	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Engagement is reopened	Engagement	Ensures closure information is removed and object is marked active before reopening.
Validate account change for engagement	Engagement	Prevent account change if the engagement has objectives, success cases, internal plays, or risk signals associated with it.
Validate engagement parent	Engagement	Prevent cyclic relationship for the parents in engagement hierarchy.
Validate onboarding for engagement	Engagement	Ensures the engagement account matches the account of its onboarding case and sets the go live date based on the go live date of its onboarding case.
Domain - Set Domain	Success objective	Sets the domain information.
Required fields for objective	Success objective	Validates required fields
Validate closure for objective	Success objective	Ensures closure information is populated and object is marked inactive before marking closed/canceled.
Success objective is reopened	Success objective	Ensures closure information is removed and object is marked active before reopening.
Validate engagement change for objective	Success objective	Prevents engagement change if the objective has outcomes or risk signals associated with it.
Validate planned start and stop	Success objective	Ensures planned stop date is not before planned start date.
Domain - Set Domain	Success outcome	Sets the domain information.

Business rule	Table	Description
Required fields for outcome	Success outcome	Validates required fields.
Validate closure for outcome	Success outcome	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Success outcome is reopened	Success outcome	Ensures closure information is removed and object is marked active before reopening.
Validate objective change for outcome	Success outcome	Prevents objective change if the outcome has initiatives or risk signals associated with it.
Validate planned dates	Success outcome	Ensures planned stop date is not before planned start date.
Validate tracking method	Success outcome	Validates tracking method to see if the correct reference field for tracking is populated.
Required fields for initiative	Success initiative	Validates required fields.
Validate closure for initiative	Success initiative	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Success initiative is reopened	Success initiative	Ensures closure information is removed and object is marked active before reopening.
Validate outcome change for initiative	Success initiative	Prevents outcome change if the initiative has success tasks or risk signals associated with it.
After close or cancel SI	Success initiative	Cancels process automation playbooks associated with initiative if closed or canceled.
Required fields for success case	Success case	Validates required fields.
Validate closure for success case	Success case	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Success case is reopened	Success case	Ensures closure information is removed and object is marked active before reopening.
Validate engagement update	Success case	Prevents engagement change if the success case has success tasks or risk signals associated with it.
Required fields for touchpoint	Touchpoint	Validates required fields.
Validate closure for touchpoint	Touchpoint	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Touchpoint is reopened	Touchpoint	Ensures closure information is removed and object is marked active before reopening.

Business rule	Table	Description
Validate engagement update	Touchpoint	Prevents engagement change if the touchpoint has success tasks or risk signals associated with it.
Required fields for success task	Success task	Validates required fields.
Validate closure for success task	Success task	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Success task is reopened	Success task	Ensures closure information is removed and object is marked active before reopening
Validate parent change for success task	Success task	Prevents parent change if the success task has risk signals associated with it.
Required fields for internal play	Internal play	Validates required fields.
Internal play is closed or canceled	Internal play	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play	Internal play	Ensures closure information is removed and object is marked active before reopening.
Parent for internal play must be empty	Internal play	Ensures parent is empty for all internal plays.
Validate engagement change	Internal play	Prevents engagement change if the internal play has internal play tasks or risk signals associated with it.
Required fields for internal play task	Internal play task	Validates required fields.
Internal play task is closed or canceled	Internal play task	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play task	Internal play task	Ensures closure information is removed and object is marked active before reopening.
Validate internal play change	Internal play task	Prevents internal play change if the internal play task has risk signals associated with it.
Domain - Set Domain	Risk signal and issue	Sets the domain information.
Field validation	Risk signal and issue	Validates required fields.
Validate risk signal closure	Risk signal and issue	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen risk signal	Risk signal and issue	Ensures closure information is removed and object is marked active before reopening
Avoid duplicate definition record	Definition record	Ensures the no two records share the same title and category.
Domain - Set Domain	Definition record	Sets the domain information.

Business rule	Table	Description
Set active flag	Definition record	Sets status to active if published, else inactive.
Avoid duplicate risk signal solution	Risk signal solution relationship	Ensures the no two records share the same solution record.
Avoid duplicate squad member	Squad member	Ensures the no two records share the same user and responsibility
Domain - Set Domain	Squad member	Sets the domain information.
Avoid duplicate engagement to contract relationship	Engagement to contract relationship	Ensures the no two records share the same engagement and contract.
Validate contract account	Engagement to contract relationship	Ensures contract account matches the engagement account.
Contract relationship updated	Engagement to contract relationship	Ensures renewal date for engagement is updated to the date of the earliest non expired contract.
Contract relationship removed	Engagement to contract relationship	Ensures renewal date for engagement is updated to the date of the earliest non expired contract.
Validate context on publish	Data Source	When publishing a data source, it needs to have at least one valid context record, which should have at least one context mapper record associated.
Avoid duplicate data source	Data Source	Data source should not have duplicate source and configurations.
Autopopulate unit of measurement	Data Source	Automatically populated unit of measurement for data source.
Last run/Next run validation	Data Source	Data source last run date should not come after next run date.
Unique source to context	Context Engine Mapper	Ensure there is an unique source to context.
Process externally sourced context data	Context Engine Data	When creating a data record for external source, update associated data source date last run field and populate data record's context field.
Validate externally sourced context data	Context Engine Data	Context engine date records with external source should have all required fields.
Unique context per source	Context	Context record's mappers should be unique.
Abort if duplicate record found	Engagement Risk Definition	Aborts if similar record already exists
Abort if invalid template	Engagement Risk Definition	Aborts if risk template set for the risk definition is invalid
Abort if duplicate record found	Risk Threshold Override	Aborts if similar record already exists

Business rule	Table	Description
Abort if no context mapper for risk def	Engagement Risk Definition	Aborts if risk definition is table type and no active mapper exists with the table selected in risk definition as the source and engagement as context
Abort if color or range validation fails	Color Banding	Aborts if duplicate color exists for a record of the same type or max value is lesser than min value or if the given min-max range already overlaps with another existing record of the same type.
Abort if global min-max range is invalid	Color Banding	Aborts if global band has min less than 0 and max greater than 100
Limit # of global health definition to 1	Engagement Health Definition	Ensures there is at most 1 global health definition in system
Unique engagement health definition	Engagement Health Definition	Ensures each health definition is unique
Validate sum of health def config weight	Engagement Health Definition	Checks all health definition metric configuration for a health definition sums to 100
Abort creation for published health def	Health Metric Configuration	User should not be able to create health metric configuration for published health definition
Check unique health metric configuration	Health Metric Configuration	Metric configuration for a health definition should not be duplicate by data source
Update last touchpoint	Touchpoint	Update last_touchpoint field in engagement table
Update last touchpoint for Delete	Touchpoint	Update last_touchpoint field in engagement table
Avoid duplicate entitlements	Applicable Entitlement	Aborts if similar record already exists
Avoid duplicate sold product	Applicable Sold Product	Aborts if similar record already exists
Avoid duplicate customer team	Applicable Customer Team	Aborts if similar record already exists
Avoid duplicate account team	Applicable Account Team	Aborts if similar record already exists

Customer success tables

This section includes the customer success tables.

Table	Description
Engagement	As a provider, delivering value to an enterprise customer [account] is not a ‘one-time’’ event, it is a journey with multiple activities, both internal and external during its lifecycle.

Table	Description
Success objective	Success objectives represents the value that the provider has sold to an enterprise customer. This value can be defined for one or more products.
Success outcome	Success outcomes are measurable components of success objectives. They can be monitored through analytics within the ServiceNow AI Platform or through a 3rd Party integration tools.
Success initiative	Success initiatives are a planned set of actions (workflows) that the provider and enterprise customer agree to take and complete on the customer's value realization journey.
Success case	Success cases are an unplanned set of actions a provider takes to support a customer engagement activity.
Success task	Success tasks are planned or unplanned actions that either the provider or enterprise customer must complete in support of a success initiative (planned) or a success case (unplanned).
Touchpoint	A touchpoint captures and supports conversations such as scheduling calls, sharing reports, and presentation material.
Internal play	Internal plays are planned or unplanned actions tied to the engagement lifecycle. Internal plays often require internal sub-tasks and follow a playbook with pre-defined activities.
Internal play task	Internal play tasks are actions that are created as result of a specific internal plays being created. These tasks must have a clear purpose and if possible, must be created through playbook automation [automatic, optional, or conditional].
Risk signal and issue	Risk signals and issues are a way of recording and managing risks tied to an engagement or onboarding so that the provider can take appropriate actions.
Definition record	The ALE definition record is used to specify categories that can be used to launch success play workflows that can create records and trigger playbooks automatically.
Success launcher notifier	The success launcher notifier tracks the status of the success play.
Data source	Specifies whether an external source or performance indicators are used to collect data to calculate the health or risk score.
Context	Used to associate the data being collected with an engagement or success outcome table.
Context engine mapper	Specifies the record for which the data source will be applicable.
Context engine data	Based on the data source and context engine mapper, when the scheduled jobs are run, the collected data is stored in the context engine data table.
Engagement health definition	Used to set up the health definition. You can define a global health definition or an engagement specific health definition.
Health metric configuration	Used to specify the metrics used to calculate the health score and the weight given to each metric.

Table	Description
Engagement risk definition	If the type is metric, specifies the metric, threshold condition, threshold and applicable engagements. If the type is table, the risk records are created for the records matching table and conditions specified.
Risk threshold override	If you want to override a risk threshold value, you can define additional conditions in this table.
Risk occurrence	Records risk occurrence if an active risk exists for the category, source record and engagement.
Color banding	Configure the color bands for health score either at the global level or for specific metrics.
Applicable sold products	Associates the applicable sold products with an engagement.
Applicable entitlements	Associates applicable entitlements with an engagement.
Applicable team members	Associates team members with an engagement.
Applicable customer team	Associate a customer team with an engagement.