Zurich Customer Success Management

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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.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

Get started

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.

Explore Learn about the key features and benefits of Customer Success Management	Configure Plan and customize Customer Success Management to meet your needs
Use Use Customer Success Management to manage the account lifecycle	Reference Get information about the data model and installed components

Additional resources

- Learn more about what's new and changed, see the Customer Success Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Success 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 ServiceNow Impact.
- Connect with other Customer Success Management users at Now Community.

Explore 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.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

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 verify 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.

Account onboarding

The account onboarding feature 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.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

The account onboarding feature includes a playbook, an account 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 that enables you to build a repeatable onboarding process that meets business requirements.
- Onboarding cases and case tasks: A central record for the onboarding team including dedicated tasks to assign work, automate, and capture data. 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 workflow

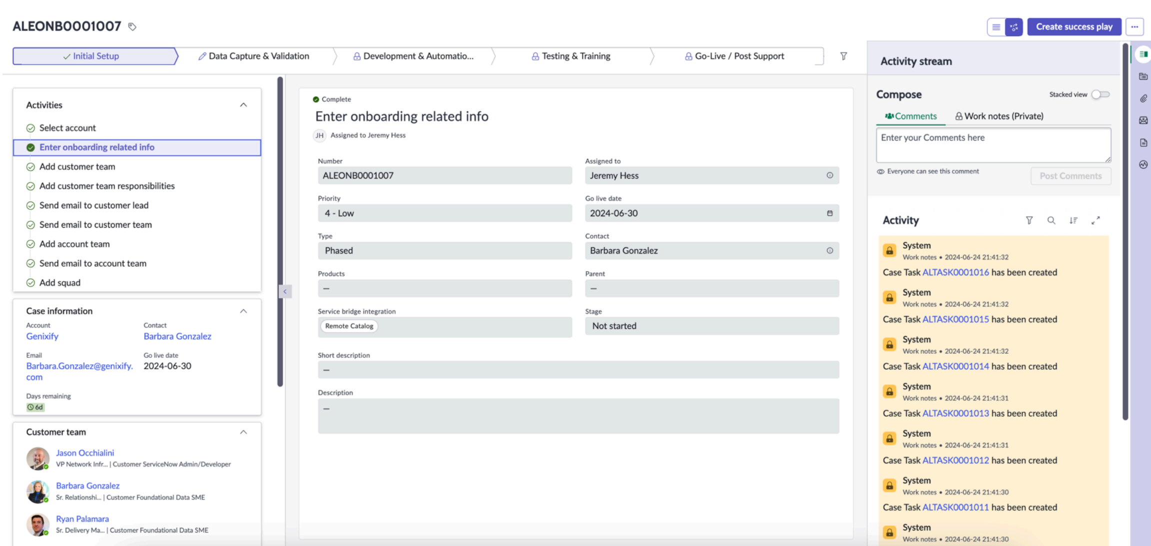
The account onboarding workflow involves the following stages:

- 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.

Onboarding playbook

The 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 the Configure the onboarding playbook activities 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.

Onboarding case and case tasks

The onboarding case is a central record that manages new customer account setup, activation, and subsequent updates like product additions, account modifications, and data maintenance.

By tracking each step of the onboarding and expansion process, customer success teams can guide customers through setup requirements and key milestones.

Customer success managers can use the onboarding case record to:

- Outline the specific tasks and milestones in the customer onboarding process.
- Track progress and record the completion of critical activities.
- Trigger key events during the onboarding phase.
- Help transition the account to the next stage in the customer success journey.
- Manage new products and services.

Onboarding case tasks are used to capture and track specific tasks associated with the customer account during each stage of the onboarding process. Customer success managers can track task progress across accounts and verify that important items haven't been missed. See Create an account onboarding case for more details.

Data import and validation

Use this feature to streamline the migration and onboarding of customer data into the ServiceNow AI Platform.

The data import option enables you to organize and track tasks required for importing data and verify that the data is complete and accurate. It plays a critical role in onboarding new accounts and facilitating updates to existing ones, helps reduce manual effort, and improves data integrity.

The Data Validation Assist feature streamlines the manual data entry process by verifying that required fields are completed and potential errors are flagged. This option is useful in scenarios where automated or large-scale integrations may not be available or practical.

For more details on the data import and validation process, see Data capture and validation.

Customer success

Learn how your organization can use the customer success solution to engage customers, run success plays to mitigate risks, and identify expansion opportunities.

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With the customer success solution, 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 teams can:

- Inspire customer loyalty and retention, by not only ensuring adoption, but also customer mastery of its products.
- Increase the 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

The customer success workflow 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

Engagements

Engagements can document and track interactions between the service provider and customer accounts throughout the customer success journey.

An engagement provides a centralized view of items associated with the engagement such as historical health trends, touchpoints, meetings, objectives, outcomes, and much more.

The engagement record is used to:

- Track customer history: It captures past interactions and enables the customer success teams to monitor the account journey.
- Make informed decisions: Set reminders for future events and maintain consistent follow-ups as required.
- Create automated triggers: Can be configured to take action automatically based on the conditions of the engagement itself or related data.
- Provide enhanced reporting and analytics: Generates reports and insights related to account health, satisfaction levels, and engagement frequency.

For more details on the engagement record and its features, see Engagement home page.

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's stable or in decline. They can use key business and operational indicators—sourced from internal data, external data lakes, or integrated via Workflow Data Fabric—to define and measure performance at a global level or for specific engagements based on contractual needs. Any available or reachable data can contribute to deriving this score, providing flexible insights. The health score of an engagement can provide insights and help customer success managers to identify trends and act if necessary.

The health score can be calculated using different metrics like CSAT score and product usage. 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 Calculate the engagement health score 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 the 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 by a risk definition when a threshold value is breached or a specific condition is met. See Create a risk definition.

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

- Customer satisfaction (CSAT) survey results declined by X% for a product
- NPS dropped to 7
- License utilization is below 50%
- The 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 the Risk portfolio dashboard for details.

Touchpoints

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

Touchpoints support conversations between providers and customers throughout the engagement life cycle. 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.
Success Customer	Can create and update touchpoints, meeting records, and schedule meetings.

See Touchpoint home page for more details.

Product adoption and capability usage

Product adoption and capability usage measure how effectively customers are adopting or engaging with a product.

It provides insights into how a product is used and integrated into customer workflows. Product adoption and capability scores are calculated based on the product usage metrics such as licenses used, tasks completed, and number of active users. Higher product adoption is associated with greater customer satisfaction, retention, and potential for expansion.

You can use this feature to:

- Identify active and power users who fully leverage the product.
- Highlight areas where customers need training or support.
- Predict churn risk by pinpointing users with low engagement or low adoption levels.
- Demonstrate value realization by ensuring that users can achieve their desired outcomes.

You can calculate product adoption and capability scores for any sold product associated with an engagement. Before calculating the scores, you must create product capability records and associate them with one or more capability usage records. You can associate a primary capability directly with a specific product. You can also associate multiple secondary capabilities that belong to a single primary capability. See Create a product capability for details.

For example:

- Sold product: ITSM
- Primary capability: Incident management
- Secondary capabilities: Incident logging, incident prioritization.

You can configure how the product adoption and capability scores are derived and displayed on the Engagement home page and the Product Capability page. See Configure DCE Visualizations for details.

Related topics

Product adoption

View product usage and capability data

Data Context Engine

The Data Context Engine breaks down silos by aggregating data from multiple sources—both internal and external—collecting it in one place to enable data-driven, actionable decisions.

The insights gained from analyzing operational data can be used to deliver proactive service, mitigate risks, trigger configured customer plays, and enhance overall engagement strategies. With the Data Context Engine, you can:

- Collect Data: Gather information from multiple sources including Performance Analytics (PA) indicators and external systems.
- Analyze Information: Process and categorize data using customizable breakdowns and associations, and generate insights.
- Visualize Results: Present findings through comprehensive dashboards and reports.

Data collected by the Data Context Engine is used to calculate and maintain:

- Health scores: Calculate health scores for customer engagements.
- Product usage and adoption scores: Generate scores to measure product usage and adoption.
- Risk signals: Identify and generate risk signals.
- Success outcomes: Create success outcomes based on the collected data

To collect and use data, you must set up a data source and link it to the appropriate context table (engagement, success outcome, or product usage). The Context Engine Data table stores this information and updates health scores, adoption metrics, risk signals, and success outcomes when scheduled jobs run. For more details, see Set up the Data Context Engine.

Data Context Engine (DCE) Insights

DCE Insights is a Data Context Engine feature that enables the visualization of identified metrics for product and capability usage records.

You can configure DCE Insights to display contextually by using relevant attributes of an engagement, product, and more to determine the correct metrics, thresholds, and values to display. For example, you can display 10 key indicators on an account record page and a different set on a sold product page. Additionally, you can define targets and baselines for each data source and specify conditions that determine when the data appears.

You can configure visualizations and associate them with entities in the DCE Insights table, which tracks usage data. Each entity in the DCE Insights table links to one or more entities in the DCE Insight Items table. The DCE Insights table can be configured to specify where the associated DCE Insight Items appear. The following entities and insight items are available with the base system:

- Product usage: Enables you to track usage data at the product level. It includes the following DCE Insight Items:
  - Adoption score
  - Satisfaction score
  - Monthly active users
  - Monthly license utilization
  - Monthly transactions
  - Auxiliary metrics
- Product capability usage: Enables you to track usage data at the capability level for a product. It includes the following DCE Insight Items:

- ○ Adoption score
- ○ Auxiliary metrics

For more information on configuring DCE Insights, see Configure DCE Visualizations.

Success blueprint template

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

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

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

The template provides a standardized approach for 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.

Customer success playbooks

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

Playbooks provide step-by-step guidance and include multiple stages and activities that must 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 Playbook layout and features. The following playbooks are available:

- Customer play playbook
- Internal play playbook
- Renewal playbook

Customer play playbook

Use the customer play playbook as the starting point to define the customer play 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 customer play record for an engagement and enter the core information.
- Assist: Create success tasks related to the customer play. 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.

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 customer play.

Internal play playbook

Use the internal play playbook as a starting point to define planned or unplanned activities in which customers are not to be included. 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.

Implementation record

Implementation records are used to track the progress of a partner or a customer implementing a product or a service.

Implementation records capture the planned work items associated with an implementation such as owner, start and end dates, state, and progress. Technology service providers can monitor the various aspects of an implementation, the different parties involved, and any associated risks.

Without a structured system for tracking implementation progress, businesses face several challenges:

- Lack of visibility
- Inefficient communication
- Delayed issue resolution
- Customer churn risk
- Inconsistent onboarding

Implementation records provide a centralized view of the implementation status, and any issues encountered during the deployment process. They provide critical visibility into the deployment activities that directly impact customer success and delivery outcomes.

Implementation records can be created manually by the account onboarding manager or the customer success manager. See the Create an implementation record for details.

Configure Customer Success Management

Set up features and tasks required during the customer success journey.

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Customer Success Management configuration

Task	Description
Activate Customer Success Management	Installs Customer Success Management and related plugins.
Set up the account onboarding playbook	Configure the account onboarding playbook to import, store, manage, and publish account data.
Configure the onboarding playbook activities	Configure the account onboarding playbook activities using Workflow Studio.
Set up recommended actions for account onboarding	Set up recommended actions to display relevant recommendations in the account onboarding playbook.
Run scheduled job to back up staging table	Run a scheduled job to take a backup of the staging table at periodic intervals.
Basic customer success setup	Configure basic components such as engagements, success objectives, and touchpoints.
Manage customer success playbooks	Create playbooks to define planned and unplanned activities during the engagement life cycle.
Data Context Engine	Configure the Data Context Engine to collect, analyze, and visualize data gathered from various sources.
Create a product capability	Create a product capability record to define the features and functions offered by a product.
Configure DCE Visualizations	Configure data sources, define baselines, and targets.
Manage engagements	Configure metrics to calculate the health and risk score for an engagement.
Create a success blueprint template	Create a template with predefined success objectives and outcomes for a specific product.
Create an implementation record	Create an implementation record to capture the planned work items associated with an engagement.
Enable integration with Microsoft Dynamics CRM	Enable integration with Microsoft Dynamics CRM to assess risks and track renewal opportunities.

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.
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 administrator to create and manage case types.
Record lookup [com.snc.sn_record_lookup]	Record lookup component used to search and link a record from a table.
Data Context Engine [com.sn_data_ctx_engine]	Enables 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 single or recurring meetings with customers within the Touchpoint record.
Document management [com.snc.platform_document_management]	Enables customer success managers to store complex documents that can be saved as attachments or in the Knowledge Base.

Plugins for Account Lifecycle Events (continued)

Plugin	Description
Roadmap [sn_roadmap]	Enables customer success manager to see and plan the roadmap of success initiatives tied to success objectives and outcomes.
Product capability core [com.sn_prod_cap_core]	Enables organizations to define, manage, and assess capabilities across product models within the ServiceNow platform.
Customer central [app-customer-central]	Enables customer service agents to view complete information on the customer contacting support.
Seismic component for customer activity [devsnc-sn-customer-activity]	Shows all activities related to a contact, account, or consumer to an agent. This information can be used by an agent to assist the customer. This component accepts facets and activity feed items in JSON format along with a few other properties and renders given activities and facets.

Procedure

1. Navigate to **All** > **Application Manager**.
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>
   ```

   .

Read-only field enhancements

Read-only field protections have been moved from the client side to the server side. This prevents users from manipulating data through client-side methods.

Starting with Customer Success Management 5.3.11, the following plugins have security enhancements for read-only fields:

- Customer Success Management [com.sn_acct_lc]
- Touchpoint Meetings [com.sn_meeting_mgmt]
- Technology Core [com.sn_ti_core]
- Data Context Engine [com.sn_data_ctx_engine]

- Telecom Core [com.sn_ind_tsm_core]
- Product Capability Core [com.sn_prod_cap_core]

Account onboarding

Set up and configure the Customer Success Management application.

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 aren't working correctly. To address this issue, you must install the latest version of the playbook from the ServiceNow Store. For more details on the issues, see KB1651378.

An account boarding case is created in two ways:

- **Automatically**: When a new customer account is created, the **Creation of account onboarding case** flow is triggered, and an onboarding case is automatically generated. This trigger condition is optional and can be customized based on your requirements. You can configure playbook tasks that include identifying key team members, data import setup, and create collaborative activities.
- **Manually**: For existing customer accounts that are being onboarded in a phased manner, you can create additional 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 the current 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 and training
- Go-live/Post Support

Create an account onboarding case

Create an onboarding case for an existing customer account.

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. Select **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 required onboard a customer. For example, gathering core information like onboarding manager name, 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. Select **Continue** to go to the next activity.

Enter onboarding related info	The next activity in the playbook involves gathering onboarding related information. The required 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.
	  ◦ 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.

Activity	Details
	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 working on the account onboarding case. • Enter the First name, Last name, Email address and select **Add** to create a customer contact. • Select **Mark complete** to move to the next step.
Add customer team responsibilities **Note:** • At least one user must be set up as the customer onboarding point of contact. • Each customer contact can have only one responsibility.	Assign responsibilities to each of the customer contacts that have been added. • Select the Contact that you've added in the previous step. • In the Responsibility field, select one of the predefined user roles and select **Add** to assign responsibility for the customer contact. • Select **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. **Note:** • The first email is sent to all users who have the customer onboarding point of contact responsibility. • After the **Add account team** step has been completed, the second email to sent all other users except the customer onboarding point of contact. • The text for the email can be configured directly in the playbook.
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.

Activity	Details
	• Select a predefined user role in the **Responsibility** field. • Select a user who is assigned this role and select **Add** to assign responsibility to the team member. • Select **Mark complete** to move to the next activity. **Note:** • An account team member can have more than one responsibility. • All tasks in the playbook are assigned to the provider's ServiceNow Developer/Admin user by default. If there is more than one user with this role, the tasks need to be manually assigned.
Add squad	Add the squad members who will be involved in completing the onboarding case and other activities. This is an optional activity. Select **Mark complete** to move to the next activity.
Create engagement	This is an optional step. See Create an engagement for details. Select**Create** to create the engagement and move on 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 Progress field is updated, the State field is automatically updated based on the mapping shown after this:

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 after this:

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're 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.

Stage	Activity
Data Capture & Validation	In this stage, the important data is imported into the system. 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 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

Stage	Activity
	validation using the Data Validation Assist table for details.

Review the data in the Summary activity and select **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.

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 verify 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 necessary. 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** > **Customer Success Management** > **Data Validation Assist Support** > **Data Validation Assist** table.
2. Select **New** to open the Data Validation Assist record.
3. Select the Validation type that 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 doesn't 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 required.
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. Select **Submit** to create a 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.
- Confirm that you are in the same application scope in which the target table is present.

Procedure

1. Navigate to **All** > **Customer Success Management** > **Data Validation Assist Support** > **Import builder**.
2. Select **New**.
3. In the **Create template** tab, enter the name and select the `Target table` from the drop-down list.
4. Select the Attachments icon, upload an Excel template, and select **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 select **Continue**.
   The data source is created and is displayed in the Data Source tab in the related list. Select the *Name* link to view the data source. Note that the Name field shows the data source name with the prefix `Customer Success 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 select **Continue**.
   The transform map is created and displayed in the Transform Map tab in the related list. Select the *Name* link to navigate to the transform map and view the following:
   - Source table: This is the Import set table that contains the staging data.
   - Target table: The table in which the staging data is stored.
   - 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. Select **New** (optional step) to create a 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. Select **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
Add this newly created activity definition in the Process Automation Designer and follow the instructions in Add the data import task section to create an onboarding playbook 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** > **Playbook Designer**.
2. Select the **Account lifecycle onboarding process**.
3. Navigate to the Data Capture & Validation lane and select **Add an activity**.
4. Select **Customer Success Management** and select the **Create and View ALE 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. In the Inputs section, enter the following:
   - Table: The table for which the record is being created. Select **Data 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. 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, the person it's assigned to, days remaining, account status, and the data import status. Several default tables have been configured with the base system.

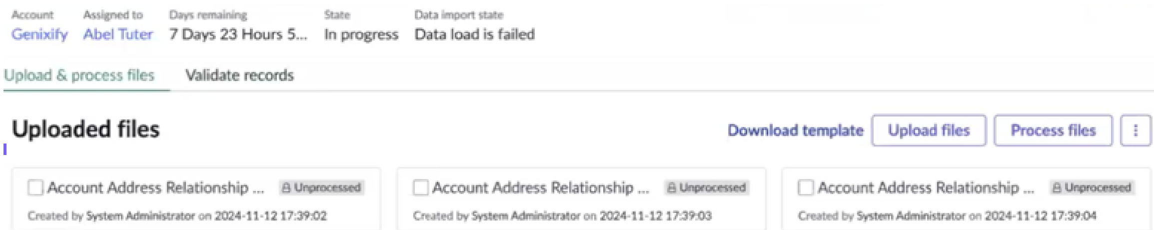
To import data into these default tables, follow these steps:

Procedure

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

Note: Verify that the XLSX file contains the accurate data that passes 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 select **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 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 necessary, and select **Save**.
7. After editing the record, navigate to the *`Yet to validate`* list, and select *`Validate`*.
8. When all the records are in the *`Ready to publish`* list, select the records to be published, and select **Publish**.

   Note:
   - If you're importing multiple files at a time, the data import process may slow down.
   - While the data is being validated, select **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 is also cleared.
   - Select the **View details** toggle icon to view the record details.
   - Select **Close task**. Enter the Close notes and select **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

- Select **Discuss** to start a sidebar discussion about this data import task. In the pop-up window, select the participants for the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this onboarding case. Select **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 select **Send email**.

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

Development and automation

This phase is used to track and complete critical activities including account relationship management, maintenance scheduling, Service Level Agreement (SLA) definition, and Service Exchange installation (when required).

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 activities 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 necessary. See Configure onboarding tasks in playbook for details on simple configuration tasks.

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

Testing and training

These phases are designed to involve customers in testing and confirm that they have received adequate training 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 Select **Mark Complete** to go to the next stage.
Go-Live /Post Support		Go-live support case The primary case related to any onboarding issues that are a result of go-live. The onboarding team works with the appropriate teams to resolve any outstanding issues.

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

- Select **Discuss** to start a sidebar discussion about this onboarding case. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this onboarding case. Select **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.
- Select **Create success play** to create automated actions that must 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 select **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 select the **List** icon.
2. Navigate to the **Customer Success** > **All Onboarding Cases** and open the onboarding case you want to cancel.
3. Select 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 pop-up message asking to confirm the cancellation is displayed. Select **Yes** to confirm. The Resolution code is automatically updated to `Voided/Canceled`.
- Verify that all the required fields are filled out and select **Save**. The account onboarding case is canceled.

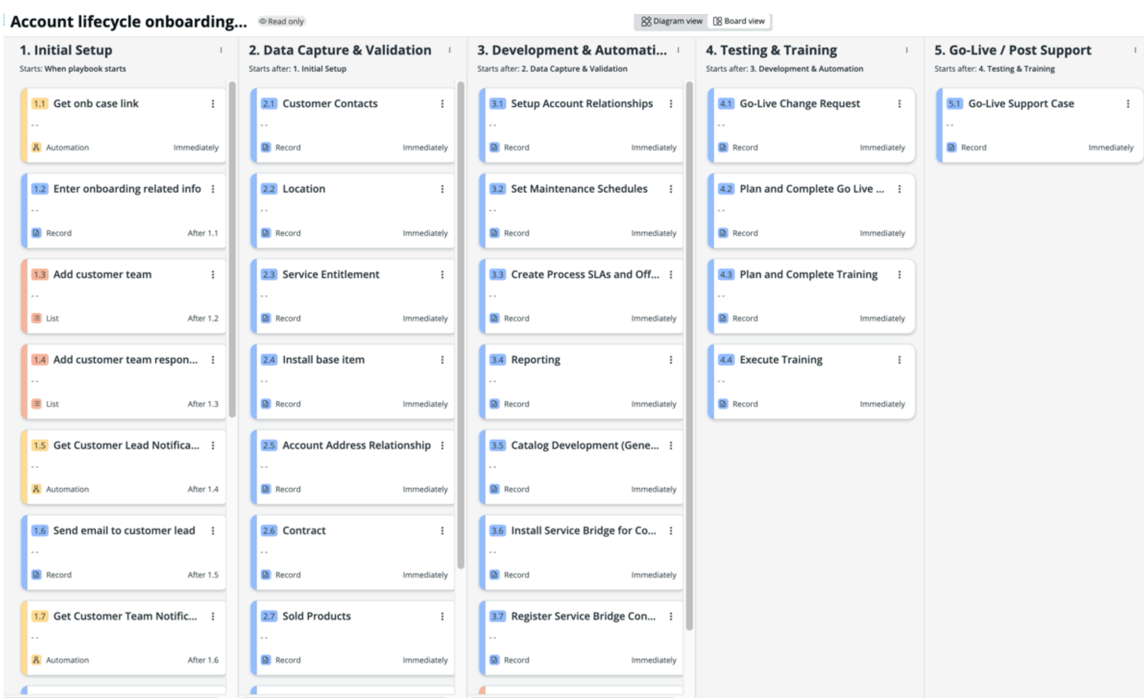
5. To close the account onboarding case, follow these steps:
    - Change the State to **Closed**.
    - Select the Resolution code from the drop-down list:
        - Successful - No issues
        - Successful - With issues
        - Unsuccessful - Unable to complete
        - Voided/Canceled
    - Confirm that the rest of the required fields are filled out and select **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 onboarding playbook activities

Use Playbooks in Workflow Studio to configure the account onboarding playbook activities.

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 Playbook builder.



Configure onboarding tasks in playbook

You can configure customer success onboarding tasks in a playbook using the Process Automation Designer.

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 onboarding tasks in a 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** > **Playbook 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 **Onboarding Task** table.
8. Add all required fields and any other fields that must be populated for this task in the Customer success onboarding in the onboarding 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.
- The 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_acct_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`.

Customer success

This section describes the different customer success capabilities and how to configure them.

Basic customer success setup

Define the basic customer success components.

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.customer_success_agent

About this task
After the account onboarding has been completed, the next step is to create an engagement that 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 life cycle.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Engagements** and select **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 required field.
Parent	Relationship of parent and child between engagements.
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 life cycle. This can be: ◦ Initial onboarding ◦ 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 required field.
Initial go-live	The customer's initial go-live date.
Renewal date	The renewal date for the customer contract.
Title	Enter a title for this engagement record. This is a required field.

Field	Description
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. Select **Save** to create an 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.customer_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 select **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 required 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. ◦ New ◦ Define ◦ In progress

Field	Description
	○ Canceled ○ Closed
Progress	Current progress of this objective. ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this objective in comparison to others. ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date on which the work for this objective is scheduled to start.
Planned stop	Date on which the work for this objective is scheduled to stop.
Title	Enter a title for this objective. This is a required 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 required field.
Work notes	Any internal notes regarding this objective.

4. Select **Save** to create a success objective.

Create a primary success outcome

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

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

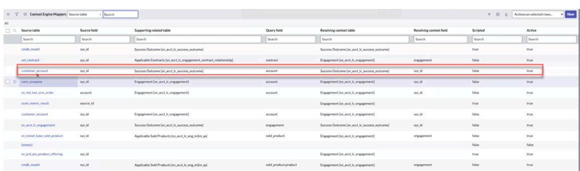
Primary success outcomes are measurable components of success objectives. They’re both measurable and actionable and progress can either be tracked automatically using data collected by the Data Context Engine, or manually for outcomes which aren't easily tracked through metrics.

Procedure

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

Primary 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.
Success objective	Select the success objective with which this outcome should be associated. This is a required field.
Owner	The internal person responsible for tracking the achievement of this outcome.
State	State of the primary success outcome. ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this outcome. ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this outcome in comparison to others. ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date on which the work for this outcome is scheduled to start.
Planned stop	Date on which the work for this outcome is scheduled to stop.
Title	Enter a title for this outcome. This is a required field.
Watch list	Select the users who should be notified of any updates to the outcome.

Field	Description
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 required field.
Work notes	Any internal notes regarding this outcome.
Unit	Unit of measurement of this success outcome.
Tracking method	Tracking method for this outcome. ○ 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 have been configured. **Note:** The metric values are automatically populated if: ▪ The context for the data source must be configured to reference the primary success outcome table. See Define the data source. ▪ The source and the resolving context tables must be correctly configured. See Configure 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 primary success outcome.

4. Select **Save** to create a primary success outcome.

Create a success initiative

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

Before you begin

Role required: role sn_acct_lc.customer_success_agent , sn_acct_lc.customer_success_customer

About this task

Success initiatives are a set of planned activities or tasks that a provider and a customer must complete achieving a primary 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 Playbook builder for the details.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Initiatives** and select **New** to launch the playbook.
3. In the Initial setup page, select the primary success outcome associated with this initiative.
4. Select **Continue** to move to the next tab.
   The success initiative record is created.
5. In the Plan section, enter the core information for this initiative as follows.

Primary success outcome	The primary success outcome associated with this initiative. To create applicable success outcome, see Create an applicable success outcome.
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. ○ General ○ Strategic planning ○ Architecture and design ○ Adoption ○ Technical guidance
State	State of the initiative. ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this initiative. ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this initiative in comparison to others. ○ 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.
Product	Automatically populated from the success objective table when primary success outcome is selected.
Needs attention	Clear the check box to make Blocked by capability work.

6. Select **Mark Complete**.
7. In the Collab and Complete step, select **Create Task** to create a sample success task automatically, or select **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.
     - Achieved
     - Partially achieved
     - Missed
     - Canceled
   - Close notes: Provide a description on which this initiative is being closed.
9. Select **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. Select 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: Select **Discuss** to start a sidebar discussion about this initiative. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this initiative. Select **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 the details.
- Email: Open the **Activity stream** and select **Email** from the More drop down list. Enter the required details and select **Send email**.

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

Create an applicable success outcome

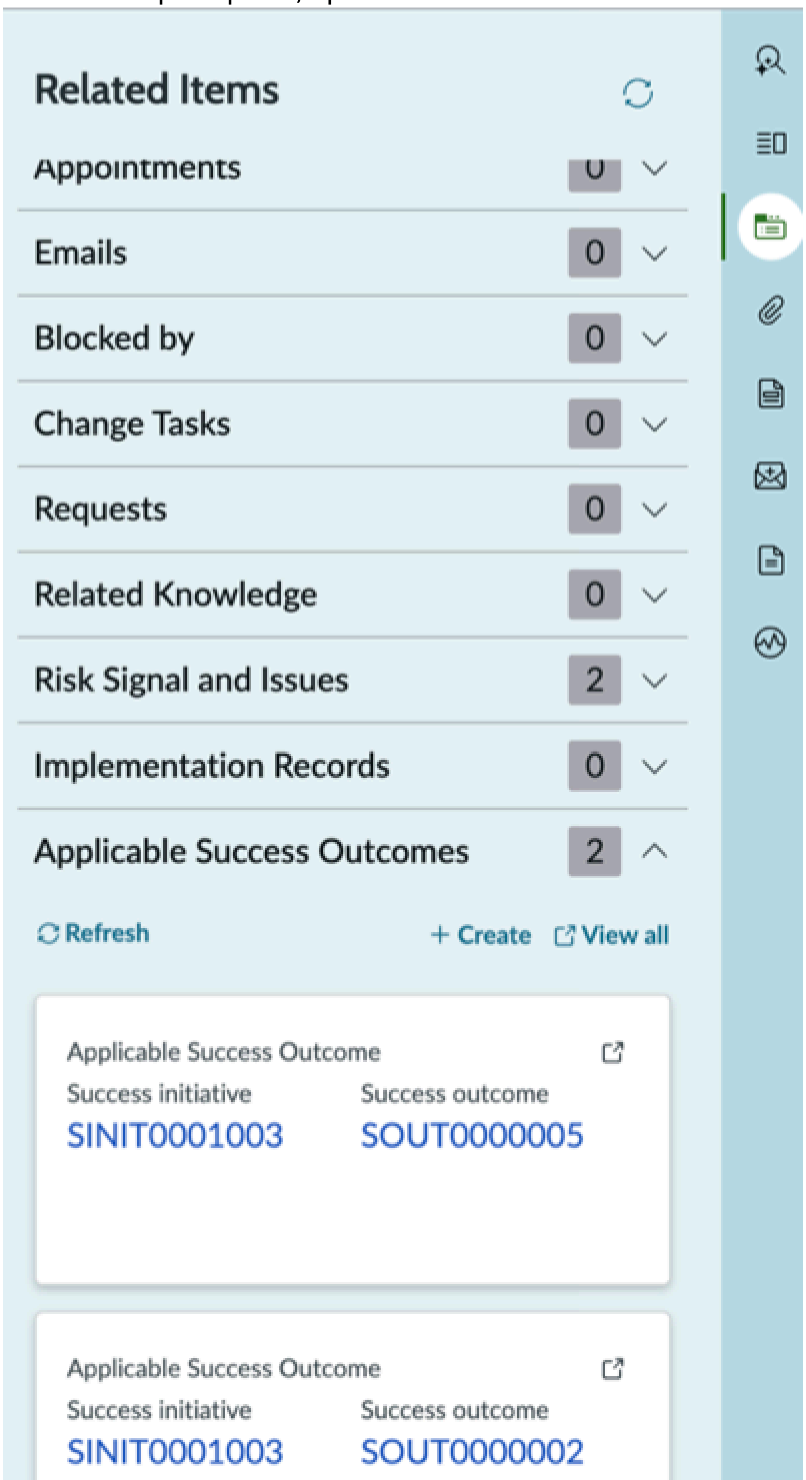
Create the applicable success outcomes to support the primary success outcome.

Before you begin

Role required: sn_acct_lc.customer_success_agent

Procedure

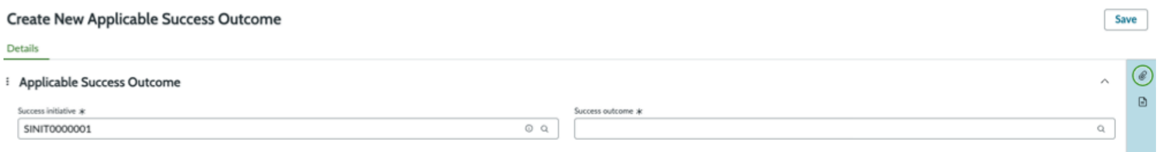
1. Navigate to **All** > **CSM/FSM Configurable Workspace** > **All** > **All Initiatives**.
2. Open the success initiative for which you want to add success outcome.
3. In the conceptual panel, open the **Related Items**.



4. In the Related Items, expand **Applicable Success Outcomes** card.
5. Select **Create**.

6. On the form, select the success outcomes.

   A single initiative can be associate with the multiple success outcomes under the same success objective.



7. Select **Save**.

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.customer_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 required field.
Channel	The channel used for communication. This can be: ◦ Web ◦ Phone ◦ Email ◦ Chat ◦ Social ◦ Community ◦ 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

Field	Description
	○ 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 check box 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 required field.
Watch list	Select the users who should be notified of any updates to the touchpoint.
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 required field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that must be provided to the customer.
Needs attention	Clear the check box to make Blocked by capability work.

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

6. Select **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.customer_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. See Create a risk definition for details on setting up a risk definition.

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: ○ 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.
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.
Tracking method	The origin of the risk signal. This can be:

Field	Description
	◦ 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: ◦ 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.

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

Create a customer success definition record

Create a Customer Success 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 Customer Success 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** > **Customer Success Definition** and click **New**.
3. On the form, fill in the fields.

Field	Description
Flow	Select the subflow that should be triggered by this Customer Success 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 Customer Success definition record. This can be: ◦ Draft ◦ Published ◦ 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 a customer success choice record

Create a record to set up the categories for the customer success choices.

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** > **Customer Success Choice** and click **New**.
3. Enter a name for the Customer Success choice.
4. Select the category as **Customer Success Definition** from the list.
5. Select the dependent category from the list.
6. Enter a description for this record and click **Save**.
   The customer success choice record you create will be available as a sub category 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.customer_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

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:

Field	Description
	◦ Draft ◦ Published ◦ Closed ◦ Cancelled
Title	Enter a title for this definition record.
Description	Enter a description for this definition record.

4. Click **Submit**.

Manage customer success playbooks

Create playbooks to define planned and unplanned activities during the engagement lifecycle.

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.customer_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.customer_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:

Field	Description
	◦ 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.
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.customer_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.
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

Field	Description
	○ 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.
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.customer_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 customer play

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

Before you begin

Role required: sn_acct_lc.customer_success_agent

Procedure

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

   - Related work: Select **Create Task** to create a customer play task. See Create a customer play task for a detailed description of this form.

     Note: customer play 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 customer play tasks have been closed or canceled, select **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. Select **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 select **Mark Complete**.
6. When all the activities have been completed, you can select **Close customer play**. The customer play record State is set **Closed** and Progress is set to **Completed**.

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

Create a customer play record

Create a customer play to specify an unplanned activity required to support an engagement. customer plays can be monitored by the customer during the engagement life cycle.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

A customer play is used to monitor external activities of an unplanned set of actions that a provider may take to support a customer touchpoint, stakeholder request, or an engagement activity. A customer play may not be associated with an objective or outcome, but can be based on the nature of the customer play and why it was created. A customer play 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 customer plays** and select **New**.
3. On the form, fill in the fields.

customer 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	Select the engagement record to which the customer play is related. This is a required field.
Contact	The key customer contact for this customer play.
Assigned to	The key internal team member handling this customer play.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this customer play. This can be: ◦ Guidance ◦ Architecture review

Field	Description
	○ Demos and POCs ○ Training
State	State of the customer play. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this customer play. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this customer play in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Due date	Date by which the customer play should be completed.
Product	The product associated with the customer play.
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 customer play. This is a required field.
Watch list	Select the users who should be notified of any updates to the customer play.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this customer play. This is a required field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that must be provided to the customer.
Needs attention	Clear the check box to make Blocked by capability work.

4. Select **Save** to create a new customer play.

 Note: You can use response templates to provide quick responses, or copy and paste relevant information from a case. Select 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

- Select **Discuss** to start a sidebar discussion about this customer play. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this initiative. Select **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 customer play task

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

Before you begin

Role required: sn_acct_lc.customer_success_agent

Procedure

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

customer 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.
Parent	The parent customer play with which this task is to be associated is displayed. You can select a different customer play task from the drop-down list.
Contact	The key customer contact for this customer play task.
Assigned to	The key internal team member handling this customer play task.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this customer play task. This can be: ◦ Workshops and meetings ◦ Design reviews ◦ Product training ◦ Professional services

Field	Description
State	State of the customer play task. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this customer play task. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this customer play task in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the customer play task should be completed.
Visible to customer	Select this check box if the customer play task should be visible to customers.
Subject	Enter the subject or the goal for this customer play task. This is a required field.
Watch list	Select the users who should be notified of any updates to the customer play.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this customer play. This is a required field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that must be provided to the customer. This information is visible to the customer.

5. Select **Save** to create a new customer play.

What to do next

- Select **Discuss** to start a sidebar discussion about this customer play task. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this initiative. Select

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 customer play

You can close or cancel a customer play and all the related tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to the **Customer Success** > **All Customer Plays** and open the customer play you want to cancel.
3. Select the **Record details** to view the customer play 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. Confirm that all the required fields are filled out and select **Save**.
6. Select **Yes** in the confirmation window to continue.
   The customer play along with all associated child customer play tasks will be canceled or closed and the Progress is set to **Finished**.

   Note: Before you close a customer play, 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 customer play.

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.customer_success_agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Select **Customer Success** > **All Engagements** and select an engagement in the list.
3. Select **Create success play**.
4. Select **Success Support** from the Category drop down list.
5. In the subcategory section, select **Simple renewal play** and select **Next**.
6. Specify the Due Date and select the user in the Assigned to field and select **Finish**.
   You 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. Select the renewal playbook that 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 required fields and select **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 select **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. Select **Open record** to verify the contract details. Select **Mark read** to proceed to the next activity.
    - Assess engagement: Enter any actions that must be performed as part of this playbook and select **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 select **Send Email**.

      Note:
      - This activity creates an internal play task that is displayed as a worknote in the Activity Stream. Select the internal play task link to view the record. When you select **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 select **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. Select **Open record** to view the internal play task. Review the opportunity details, update the status to Closed or Canceled, and select **Close** this activity and move on to the next stage.
12. In the `Track Opportunity` phase, review the contract details.
    Select **Open record** to change if necessary or select **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 select **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 select **Mark Complete**.
14. Select **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 the playbook State is set to Canceled.

Set up the Data Context Engine

Configure the Data Context Engine to collect data from different data sources and associate it with a relevant context table.

Task	Description
Define the data source	Specify whether data is being collected from PA indicators, external sources, or calculated metrics.
Configure the Context Engine Mapper	Associate the data source with an engagement, success outcome, or product usage table, and specify the record in the context table for which the data is applicable.
Configure DCE Visualizations	Configure and display metrics based on context and product usage patterns.

Define the data source

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

To define the data source, follow these steps:

1. Login as a user with the `sn_acct_lc.customer_success_application_admin` 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.
Source	Select the source from which the data is to be collected from the list. ◦ **PA indicator**: Select this option to use a PA indicator to collect performance analytics data at regular intervals and create records in the Context Engine Data table. ◦ **External**: Specify the external data source from which the data is to be collected. 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. ◦ **Calculated**: Select this option to calculate the metric values dynamically using formulas based on a combination of existing base metrics. For more details, see Define a calculated metric data source. ◦ **Table**: Select this data source type to retrieve and analyze data from internal and external tables. To retrieve data from external sources, you must install the Workflow Data Fabric Hub application and create data fabric tables. For more details, see Define a table data source.

Field	Description
	Note: The sequence in which the metrics are calculated is based on the Execution order that defines which metrics are evaluated first. The Execution order is defined as follows: ◦ PA Indicator and External: 0 (Metrics from these data sources are calculated first). ◦ Calculated metrics: 1 + Max(The child or dependent metrics associated with the parent metric are calculated first followed by the parent metric).
Frequency	Select the frequency at which the data should be collected from the list. ◦ 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 can't 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.
Breakdown table	Select the source table against which the score is calculated. **Note:** This field is applicable only if the Source type is **Calculated** See Define a calculated metric data source for details.
Target table mapping	(Optional) If the Source type is **Calculated**, you can optionally specify the Target table, Target field, and Target query field. After data collection, the calculated score is written into the matching records where the context aligns with the Target query field. See Define a calculated metric data source for more details.
Unit of measurement	Select the unit of measurement for the PA indicator that can be minutes, hours, days, months, and so on.
Aggregate	Select how the aggregate score should be calculated from the list. ◦ Average ◦ Sum ◦ Max ◦ Min ◦ Count (This is applicable only if the Source type is **Table**). See Define a table data source for details.

Field	Description
	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, and you want to calculate the aggregate score for the week. In this case, you can use the average or sum option to calculate the score.
The following fields are applicable only if you select the **Source** as **Table**.	
Source table	Select the table from which the source data is to be retrieved. This can be an internal ServiceNow table or an external table.
Group by fields	If you select the **Table** type data source, you must specify the fields by which the data should be grouped. **Note:** You can use up to two fields for grouping.
Conditions	Specify the conditions or filters that will be used while retrieving the data. For example, you can choose to retrieve records for a specified period of time.
Source value	Select the field on which the aggregation is to be performed.
Source reference	The source record used to resolve the **Group by** fields. This field is automatically populated if you selected a single reference type field in the **Group by fields** option. You must update the Source reference resolver script and specify the fields that are to be mapped if the **Group by fields** contains: ◦ Two fields (maximum allowed) ◦ A non-reference field. ◦ An external field.

4. Select **Submit** to create this data source.
5. Navigate to the **Contexts** related list and select **New**.
6. In the Context page, select the table for which this data source is applicable. This relationship enables the Data Content Engine to collect data from the specified table. Depending on the type of score being calculated, select the table as follows:
   - Health score: Select the Engagement table.
   - Success outcome: Select the Success Outcome table.
   - Product adoption: Select the Sold Products table.
   - Product capability: Select the Product Capability Usage table.

   Note: You can define multiple context tables for a single data source.
7. Enable the **Active** check box and click **Submit** to create the data source. You can associate the data source with one or more context tables.
8. Define color bands as necessary. See the Setup the color banding table for details. The color banding is applied to the health metric data displayed in the Health tab on the Engagement home page.

After setting up the data source and the context, the next step is to configure the context engine mapper. See the Configure the Context Engine Mapper for details.

Define a calculated metric data source

Define dynamic metrics using formulas based on other metrics.

Before you begin

- Role required: sn_acct_lc.customer_success_application_admin
- Configuration guidelines:
  - Select at least one Context table that matches the Breakdown table.
  - Configure calculated metrics with appropriate segment configurations and data sources. Include at least one active filter in each data source that matches the Breakdown table.
  - Use one data source per calculation to avoid duplicate scores for a single product. When multiple data sources are necessary for the same metric, make segment conditions mutually exclusive.

Procedure

1. Navigate to **All** > **Data Context Engine** > **Data Sources** > **Create New**.
2. Enter a name for the data source and select **Calculated** from the Source drop down list.
3. In the **Breakdown table** field, select the source table against which the score is to be calculated.
   For example, if you're calculating the health score for an engagement, select the Engagement table here. If you're calculating the product adoption score, select the Sold Products table here.
4. **Optional:** In the **Target table** field, select the table where the calculated score is written. Select a **Target field** and **Query field** in the Target table. The calculated score is written into the records in the Target table that match the context specified in the Query field.

   For example: If you have configured the Product Adoption Score data source as follows:

   - Data source: Product adoption
   - Target table: Product Usage
   - Target field: Adoption score
   - Target query field: Sold product

   If the calculated score for Sold product SP1 is 90.0, then in the Product Usage table, the Adoption score for all SP1 records is set to 90.0.
5. Select **Submit** to create this data source.
6. Navigate to the **Contexts** related list.
7. In the Context page, select the table for which this data source is applicable.

   Note: You can define multiple context tables for a single data source. At least one context table must be the same as the Data source and Context defined in the newly created data source.
8. Navigate to the **Segments** related list.
9. Select **New**.
10. Enter a name for the segment and specify the **Rank**.

The Rank field is used to specify the priority of the Segment.

11. The Breakdown table as specified in the Data Source is displayed.
12. Select **Add Filter Condition** and specify one of more conditions.
    You can define multiple condition-based variations for a single metric.
13. Select **Submit**.
14. Navigate to the **Segment Configurations** related list and select **New**.
    Each Segment can have one ore more segment configurations. A Segment configuration is used to define how the metric data is derived in different contexts.
15. In the Segment Configuration page, enter the following details:
    - Metric: Select a PA Indicator, External, or Calculated metric from the list.

      Note: You can't select a metric that has already been defined for the parent Segment.

    - Weight: The weight or percentage assigned to this metric in calculating the overall score.
      If you're 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
    - Target: You can select:
      - Maximize: The higher the target, the better the score.

        CSAT score: A higher value indicates a better score.
      - Minimize: The lower the target, the better the score.

        Number of P1 cases: Fewer cases indicate a better performance.
    - Direction: If multiple data records are returned for a data source, select how the aggregate score should be calculated:
      - Average
      - Sum
16. Select **Submit** to create this segment configuration.

Example:
To calculate the product adoption score for two or more products, you can configure your data source as follows:

- Select **Sold Product** in the **Breakdown table** field.
- Create a segment for Sold Product A and define segment configurations with the following values:
  - Segment Configuration 1: Metric = NPS, Weight = 60%
  - Segment Configuration 2: Metric = Clicks, Weight = 40%
- Create a segment for Sold Product B and define segment configurations with the following values:
  - Segment Configuration 1: Metric = CSAT, Weight = 50%
  - Segment Configuration 2: Metric = Time Spent, Weight = 40%

What to do next

After defining the segments and segment configurations, the next step is to configure the context engine mapper. See Configure the Context Engine Mapper for details.

Define a table data source

Use the **Table** data source to retrieve data from internal ServiceNow tables or from external sources using Workflow Data Fabric.

Before you begin

- At least one context must be defined for each **Table** type data source with a valid mapping to the source reference table. See Configure the Context Engine Mapper for details.
- Role required: sn_acct_lc.customer_success_application_admin

About this task

By defining a **Table** data source, you can:

- Retrieve data from internal and external tables (See Define a Workflow Data Fabric table data source for details).
- Map Source IDs (for example, User, Asset, Transaction) to business entities such as Sold Products, Capabilities.
- Use conditions such as Start and End dates to analyze trend data.

Procedure

1. Navigate to **All** > **Data Context Engine** > **Data Sources**.
2. Select > **Create New**.
3. On the Data Source form, enter a name for the data source and fill in the following fields. See Define the data source for details on how to create a data source.

Field	Description
Source	Select **Table** from the drop down list. This option allows you to query data from internal and external tables.
Frequency	Select the frequency at which the data should be collected from the list. ◦ Daily ◦ Weekly ◦ Monthly ◦ Quarterly
Aggregate	Select how the aggregate score should be calculated from the list. ◦ Average ◦ Sum ◦ Max ◦ Min ◦ Count: Use this option to get the total number of records in the Source table that match the filter conditions.
Source table	Select the table from which data is to be retrieved.

Field	Description
	Note: For external tables, see Define a Workflow Data Fabric table data source
Group by fields	Select one or two fields or dimensions by which the data in the Source table is to be grouped.
Conditions	Specify the filter conditions to be applied to the Source table while retrieving data. **Note:** A Timestamp or a Date field must be present in external Workflow Data Fabric tables to ensure that incremental data can be retrieved.
Source value	Select the field that should be used to calculate the aggregate score. **Note:** This is not applicable if the **Aggregate** type is **Count**.
Source reference	Select the source record used to resolve the **Group by fields**. This field is automatically populated if you selected a single reference type field in the **Group by fields** option.
Source reference resolver	You must update the **Source reference resolver** script and specify the fields that are to be mapped if the **Group by fields** contains: ◦ Two fields (maximum allowed) ◦ A non-reference field. ◦ An external field.

4. Select **Submit** to create this data source.

Example:
A few examples on how to configure the data source are given below:

- **Total number of P1 cases**: To calculate the total number of P1 customer cases on a monthly basis, specify the following:
  - Source table: customerservice_case
  - Conditions:
    - Priority: 1
    - Created between: Last month and current date
    - Group by: sold_product
    - Aggregation: Count
    - Source reference: Auto-populated to sold_product
- **Reassignment count sum**: To calculate the sum of reassignment count by Account and Product, select:
  - Source table: customerservice_case
  - Conditions: Reassignment count is not 0
  - Group by: Account, Product

- Aggregation: Sum
- Source value field: Reassignment count
- Source reference: sold_product
- Source reference resolver: Specify the mapping between the **Account** and **Product** combination and the **Sold Product** table in the script as follows:
  - `var account = groupByFieldValueMap[account]`
  - `var product = groupByFieldValueMap[product]`

What to do next

After defining the data source, the next step is to configure the context engine mapper. See Configure the Context Engine Mapper for details.

Define a Workflow Data Fabric table data source

Enable data collection and analysis from external tables by integrating the Data Context Engine with Workflow Data Fabric to generate actionable insights.

Before you begin

- Workflow Data Fabric plugin must be installed and configured. See Activate Workflow Data Fabric Hub for details.
- The Workflow Data Fabric table must have been created. See Create a data fabric table for details.
- Role required: sn_acct_lc.customer_success_application_admin

About this task

Access external data through the Workflow Data Fabric tables and analyzed it using the Data Context Engine. This data is available in real-time using a zero-copy model and synced only when queried. See Managing zero copy connections in Workflow Data Fabric Hub for details.

Procedure

1. Navigate to **All** > **Data Context Engine** > **Data Sources**and select **Create New**.
2. Select **Table** in the **Source** field.
3. In the **Source table** field, select a Workflow Data Fabric.
4. On the Data Source Form, fill in the remaining fields.
   For a description of the field values, see Define a table data source page.
5. Select **Submit** to create the data source.

Example: Total licenses used quarterly

To get the total number of licenses used this quarter across accounts and products from a Workflow Data Fabric table, select:

- Source table: df_usage_information
- Conditions: Timestamp between last quarter and today
- Group by: Account, Product
- Aggregation: Sum
- Source Reference: sold_product
- Source reference resolver: Specify the mapping between the **Account** and **Product** combination and the **Sold Product** table in the script as follows:

- `var account = groupByFieldValueMap[account]`
- `var product = groupByFieldValueMap[product]`

Note: You must update the **Source reference resolver** script to specify field mappings only when the **Group By** field contains:

- Two fields (maximum allowed).
- A non-reference field.
- An external field.

What to do next

After defining the data source, the next step is to configure the context engine mapper. See Configure the Context Engine Mapper for details.

Configure the Context Engine Mapper

After you have defined the data source, use the Context Engine Mapper to specify the record in the context table for which it is applicable.

The Context Engine Mapper is a framework that establishes mappings between source entities and their corresponding context entities, enabling the resolution of context-specific records based on given sources such as resolving engagements from customer accounts.

You can use the Context Engine Mapper to determine which fields will be used to categorize data collected by the Data Context Engine. This mapping ensures that data is organized and analyzed based on designated breakdown fields such as account type, engagement status, or sold products.

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: If a script is defined, it takes precedence over the table based mapping. The script checks the *`Source Field`* and the ID of the record to determine the appropriate context based on the resolving context table.
- Metric based: Mapping logic can vary depending on the data source used for metrics and measurements. Can be used for more granular and context specific mappings.

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

Field	Description
Type	This can be: ○ Global: For each record in the source table, the source field value is matched against the query field in the supporting related table. If a match is found, the associated values from the resolving context field are returned as mapped context records.

Field	Description
	○ Metric based: This type is used to enable mapping specific to certain data sources or conditions. The mapping logic can vary depending on the data source used and provides enhanced filtering and flexibility.
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`*.
Metric list	If **Type** is **Metric based**, select a data source from the list. If a data source listed here is used for a specific source or target table, this mapping takes precedence over the Global mapping.
Resolving context table	The target table where resolved context records are stored.
Resolving context field	The target field where the mapped data will be stored.
Resolving table conditions (Optional)	You can use additional conditions, such as field level filters, to narrow down the results from the resolving context table based on specific criteria.
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: If a script is defined for a **Metric based** mapper, it overrides:

- Supporting related table
- Resolving table conditions

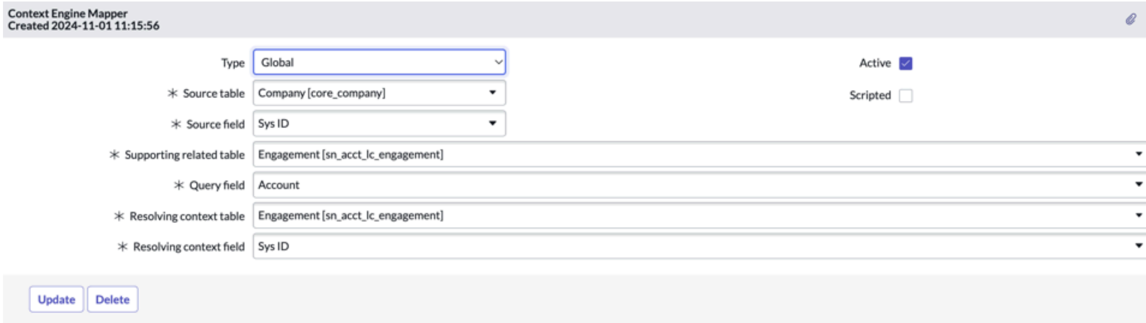
The script returns an array of context record IDs based on the conditions defined.

4. Select **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 select **Publish**.

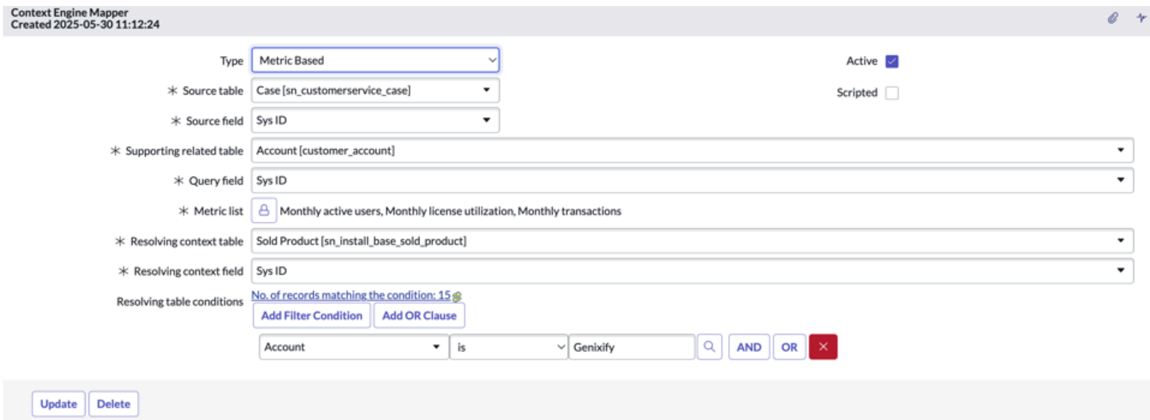
   Data will now be collected based on the predefined schedule and the context engine data record is created and stored in the **Context Engine Data** table.

The following examples show how to set up the different types of mapping:

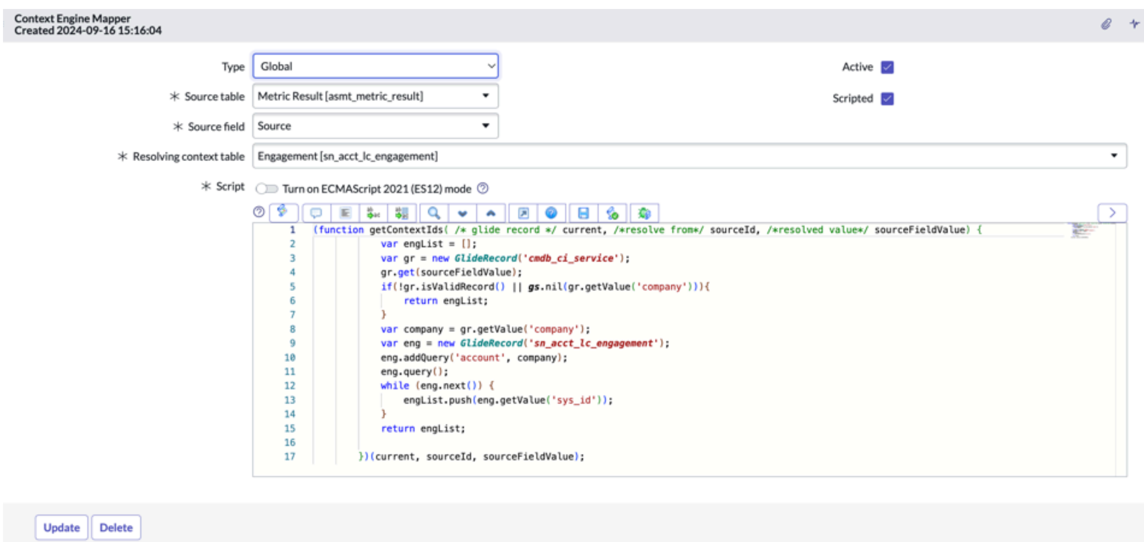
Related table (Global)



Metric Based Type



Script



Configure DCE Visualizations

Use the DCE Visualizations option to configure data sources, define baselines and targets, and apply aggregation rules. You can also define specific conditions to customize the data displayed.

Before you begin

Role required: sn_acct_lc.customer_success_application_admin

Procedure

1. Navigate to **All** > **Data Context Engine** > **Insights** > **All DCE Visualizations**.
2. Click **New**.

3. Enter the following details on the form.

Field	Description
Data source	Select the data source that will be used to collect the data for visualization.
Resolving Context	Select the context table on which the visualization is to be applied. For usage data such as adoption score or satisfaction score, select the Sold Products table.
Conditions	Define additional conditions to customize how the data is displayed.
Baseline	Specify the standard or expected value for this metric.
Target	Specify the target or desired goal for this metric.
Aggregate	If multiple data records are returned for a data source, select how the aggregate score should be calculated: ◦ Average ◦ Sum
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.

4. Click **Submit**.
5. Navigate to the DCE Visualizations M2Ms Related List and click **New**.
6. Select a **DCE Insights Item** from the list.

   The DCE Insights Item maps a specific visualization to a designated location on a layout, ensuring that insights are displayed in the right context within the user interface. The DCE Insights Item table contains the following fields.

7. Specify the Rank for this visualization and click **Submit**.
   Navigate to View product usage and capability data to view the configured metrics.

   Note: You can use the Color banding table to configure the colors that appear on the charts that appear on the product usage and capability pages.

DCE Insights tables

DCE Insights is a feature of the Data Context Engine that enhances how users view and interact with data directly on record pages and includes the following tables

DCE Visualization

DCE Visualization enables users to configure data sources, define baselines and targets, and apply aggregation rules. It also supports the setup of conditional logic, allowing visualizations to be tailored to specific scenarios, for example, displaying customer-specific data based on defined conditions. See Configure DCE Visualizations for detailed descriptions of all the fields in this table.

DCE Insights

The DCE Insights table is a central repository for all configured data visualizations. It contains the following fields.

- Name: Name of the entity.
- Entity: Table where the visualization items are to be displayed.

DCE Insights Item

Each DCE Item maps a specific visualization to a designated location on a layout, ensuring that insights are displayed in the right context within the user interface. It contains the following fields.

- Name: Name of the insight item.
- DCE Insight: References the DCE Insights entity.
- Visualization mode:
  - Single: If it is mapped to a single metric.
  - Multiple: If it is mapped to a group of metrics.

DCE Visualization M2Ms

This table maintains the relationship between DCE Visualization and DCE Insights Item. It contains the following fields.

- DCE insight item: References the DCE Insights item.
- Visualization: References the DCE Visualization item.
- Rank: The rank for the visualization.

Create a product capability

Create a product capability record and associate with one or more capability usage records.

About this task

Product capability refers to specific features or functions that a product offers. You can monitor the adoption and usage of specific product capabilities and gain insights into how effectively the product's features are being used.

Before you begin

- Role required: sn_acct_lc.customer_success_application_admin
- Product and capability usage records must already be present. See Product and capability usage records.

Procedure

1. Navigate to **All** > **Capabilities & Usage** > **Capabilities** and select **New**.
2. In the form, fill in these fields:

Field	Description
Name	Enter a name for this capability.
Description	Enter a description for this capability.
Type	The options are:

Field	Description
	○ Feature ○ Capability ○ Technical Service Select **Capability** from the list.
Category	Select the category or area to which the capability belongs.

3. Navigate to the **Product Capability Maps** related list.
4. Select **New** to associate it this capability with a product model.
5. In the form, fill in these fields.

Field	Description
State	The state of the map. ○ Draft ○ Published ○ Archived ○ Canceled
Product model	Select the product with which the capability is to be associated.
Product capability	The capability for which the product is being associated.
Active	This flag is set to **True** when the product capability map is published.
Release date	The release date for this capability.
Availability date	The availability date for this capability.

6. In the **State** field, set the status to **Publish**.
7. Select **Submit**.
   You can view the product and capability usage scores in the Engagement home page. See View product usage and capability data

Product and capability usage records

The product and capability usage records are automatically created and updated when changes occur in sold product configurations, capability mappings, or in the data context engine.

Product and capability usage records are created or updated when:

- A record is added or modified in the Applicable Sold Products table. If product capability records for the sold product exist, corresponding capability usage records are created.
- The Adoption score for a sold product is calculated. A Product Usage record is created for the sold product and the Adoption score field is updated.
- A new active record is added to the Product Capability table. A capability usage record is created and the Total Capabilities in Use field is updated in the corresponding Product Usage record.

Product Usage table

Product usage data provides insights into how customers interact with a product. This table contains the following fields:

Field	Description
Company	The name of the account associated with the sold product.
Customer priority	The customer priority for this product. • Critical • High • Moderate • Nice to have • Not required
Business criticality	The business criticality for this product. • Critical • High • Moderate • Nice to have • Not required
Asset	Asset related to this product.
Sold product	The sold product for which the product usage data is being calculated.
Install base item	The install base item for which the product usage data is being calculated.
Activation status	Indicates if the product is in use.
Usage plan	Usage plan for this product. • No plan • Planned • Activated • Deactivated
Total child products	The number of child products available.
Child products in use	Child products that are already being used.
Total capabilities	Total number of capabilities available.
Capabilities in use	The number of capabilities
Adoption score	Calculated adoption score for this product.
Perceived adoption score	Perceived adoption score for this product.
Breadth product score	Child products in use divided by the Total no of child products.

Field	Description
Monthly active users	Number of monthly active users.
Licenses used	Number licenses in use.
Transactions	Number of transactions for this product.

Product Capability Usage table

Product capabilities usage data provides insights into how a specific capability is being used. This table contains the following fields:

Field	Description
Company	The name of the account associated with the sold product.
Capability	The capability for the product.
Asset	Asset related to this record.
Sold product	The sold product for which the capability usage data is being calculated.
Install base item	The Install base item for which the product capability usage data is being calculated.
Activation status	Indicates if the capability is in use.
Usage plan	Usage plan for this capability. • No plan • Planned • Activated • Deactivated
Customer priority	The customer priority for this capability. • Critical • High • Moderate • Nice to have • Not required
Business criticality	The business criticality for this capability. • Critical • High • Moderate • Nice to have • Not required
Adoption score	Calculated adoption score for this capability.

To configure how this usage data is displayed in the workspace, see Configure DCE Visualizations.

Manage engagements

Configure metrics to calculate the health and risk score for an engagement.

Calculate the engagement health score

Use the **Calculated** metric data source to determine the health score of an engagement.

Before you begin

- Role required: sn_acct_lc.customer_success_application_admin

About this task

If you're upgrading from Customer Success Management 5.3.10 or earlier versions, you must run the `sn_acct_lc.MigrateHealthDataUtil().markHealthTablesDeprecated()` script to migrate data from the Engagement Health Definition and Health Metric Configuration tables to the **Calculated** metric data source. For more details, see KB2668490.

Procedure

1. Navigate to **All** > **Data Context Engine** > **Data Sources** > **Create New**.
2. Enter a name for the data source and select **Calculated** from the Source drop down list.
3. In the **Breakdown table** field, select the source table that is used to calculate the score.
4. In the **Target table** field, select the table where the calculated score is written.
5. Select a **Target field** and **Target Query field** in the Target table.
   The calculated score is written into the records in the Target table that match the context specified in the Query field. For calculating the health score of an engagement, you can configure the data source as follows:
   - Breakdown table: Engagement
   - Target table: Engagement
   - Target field: Health score
   - Target query field: sys_id
6. Select **Submit** to create the **Calculated** data source.
7. Select **New** in the Segments related list.
8. Enter a name for the segment and specify the **Rank**.
   The Rank field is used to specify the priority of the Segment. The Breakdown table as specified in the Data Source is displayed.
9. Select **Add Filter Condition** and specify one of more conditions.
   You can define multiple condition-based variations for a single metric.
10. Select **Submit**.
11. Navigate to the Segment Configurations related list and select **New**.
12. Select **Submit** to create this segment configuration.
13. Enter the following details.

Field name	Description
Data source	The **Calculated** data source that is used to determine the health score.
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're 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	◦ 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

14. Click **Submit** to create a new segment configuration.

What to do next

Create a new visualization using the newly created data source. See Configure DCE Visualizations for details. When the next data collection occurs, the health score is calculated and published on the Engagement page.

Create a 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.customer_success_agent
- Data source and data context engine mapping must be setup for metric based risk definitions. See 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.

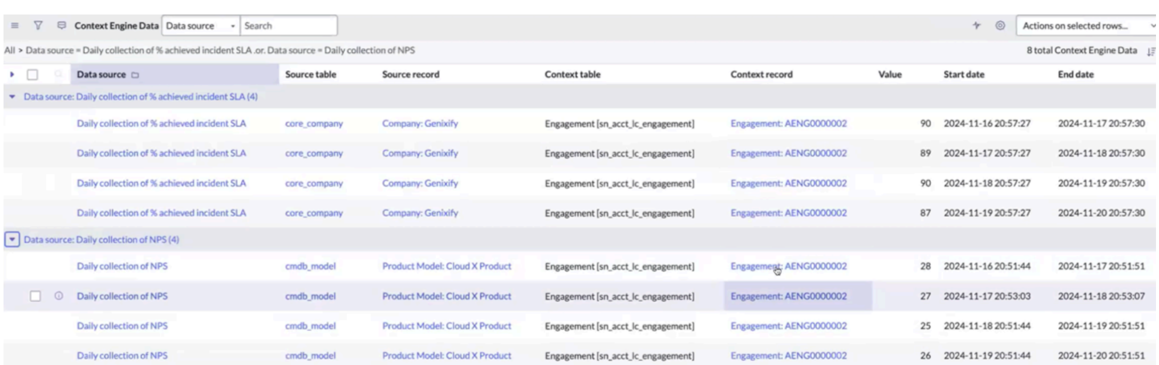
Procedure

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 Create a customer success 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're 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 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're 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.

Field	Description
	Note: A context mapper must have been defined that associates the source and the context tables. See 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.
Conditions	Specify any conditions that must 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	Select the Template tab to define the fields for the risk definition. The following are mandatory fields: ◦ Short description ◦ Description ◦ Reported by

3. Select **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 select **New**.
   Enter the following details:
   - Engagement risk definition: This is the engagement risk definition for which you're creating an override condition.
   - Threshold: Specify the override threshold value.
   - Select **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. Select **Submit** to create the override condition.
6. Select **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.

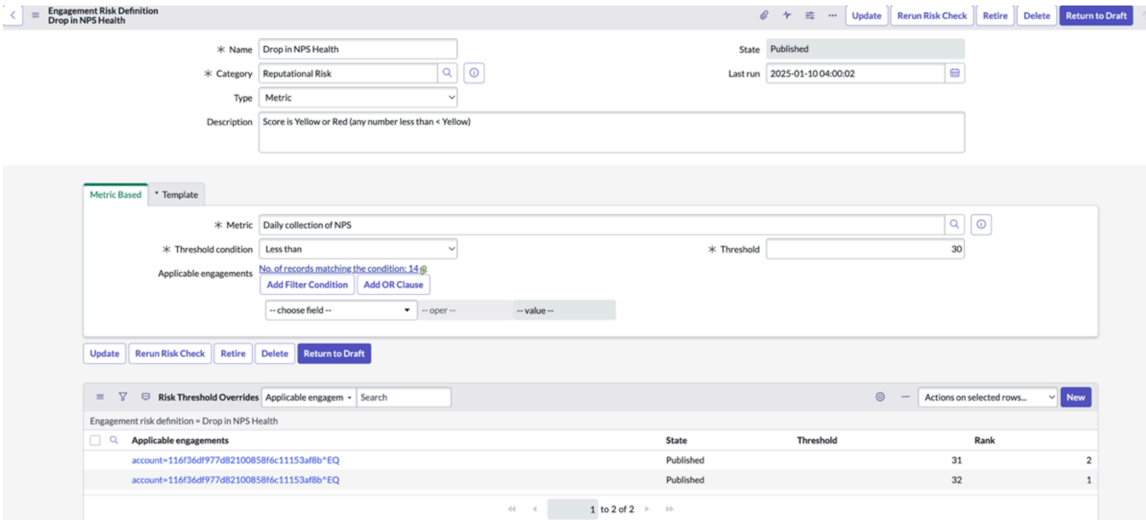


Sample risk definitions

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

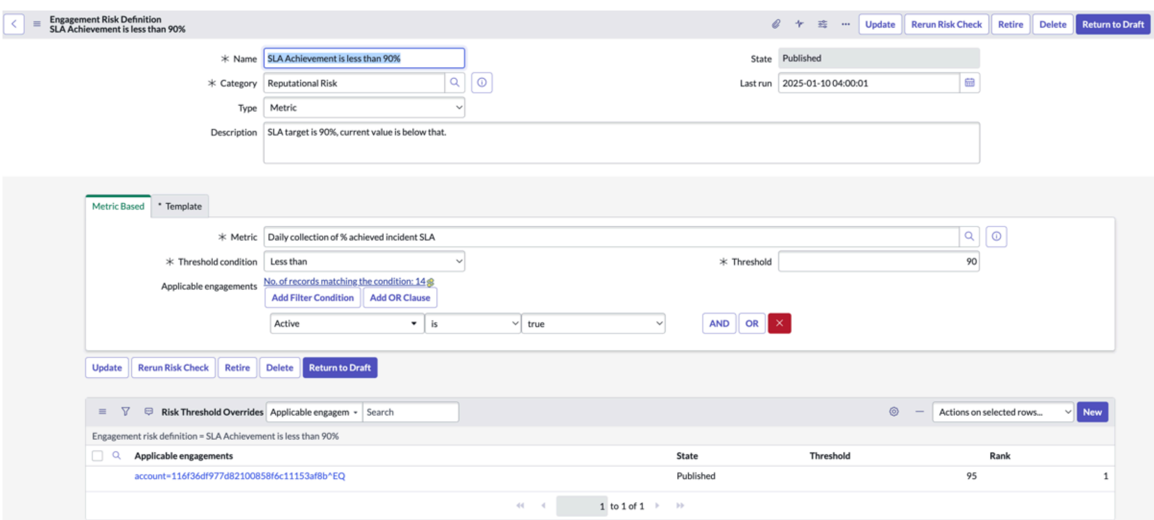
Drop in NPS health

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.

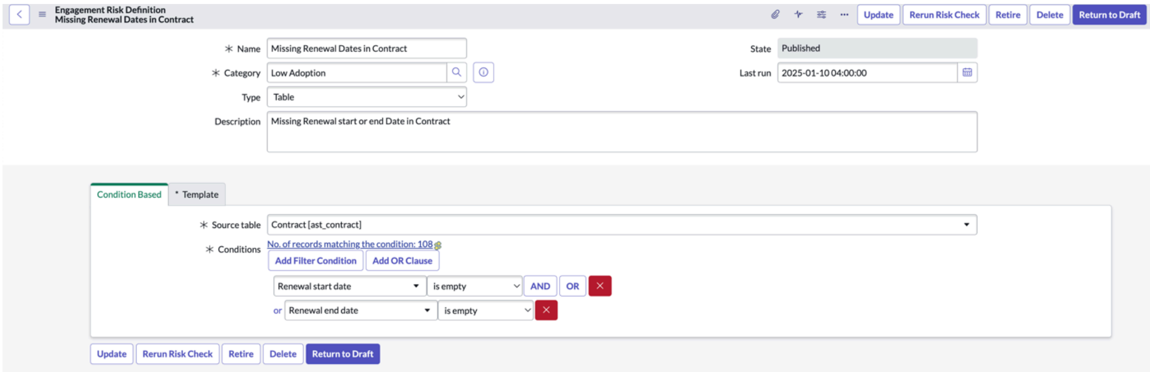


Note: For metric based definitions, the data source and the context engine mapping must be defined. See Data Context Engine for details.

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 Configure 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.customer_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

Field	Description
	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.

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**.

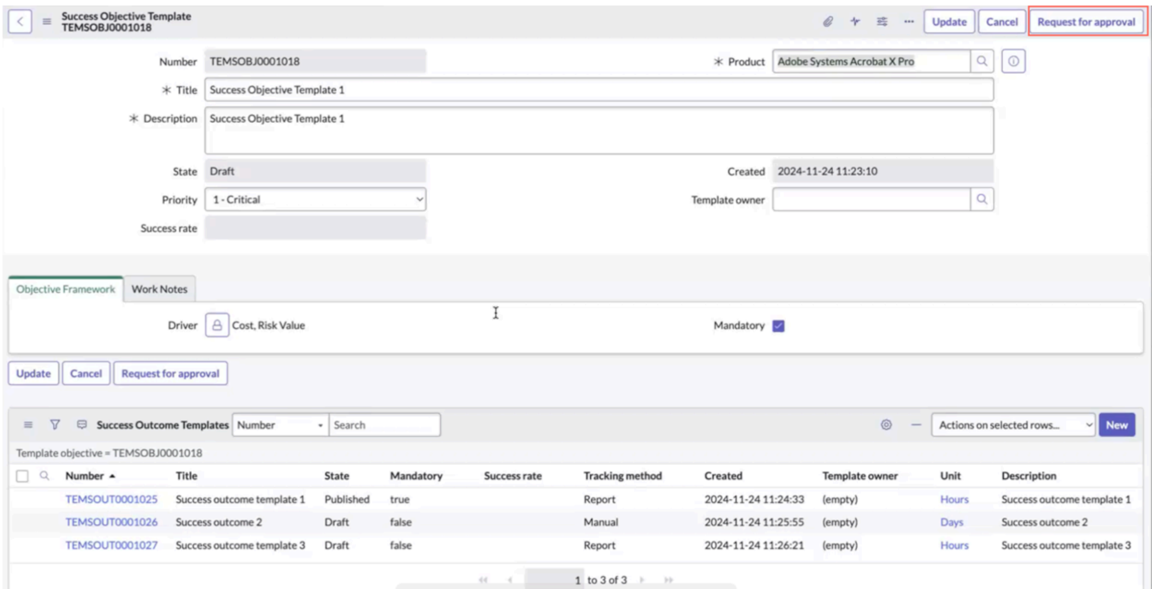
Procedure

1. Log in as a user with the template owner (sn_acct_lc.success_template_owner) role.
2. Navigate to **All** > **Customer Success** > **Success Objective Templates**.
3. Select **Create success blueprint**.
4. In the Product drop down list, from the CMDB model list, select the product for which 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.
   - Select 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 is automatically be selected when you create an engagement for the associated product.
6. Select **Save**.
   The next step is to create a success outcome template.
7. Navigate to the **Success Outcome Templates** related list and select **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. Select **Save** the success outcome template.
    - You can modify the template and change if it is in a `Draft` state. After you have made the changes, select **Update** to update and save the changes.
    - You can follow this process to add multiple success outcome templates.
11. Select **Publish** to publish the success outcome template and select **Update**.

    - You can't modify a success outcome template that is in the *Published* State.
    - Select **Cancel** to cancel a success outcome template that hasn't been approved. You see a message indicating that all associated tasks will be canceled and any progress is lost. Select **Yes** if you no longer want to use this template.

12. After you have created and published all the success outcome templates, select **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.

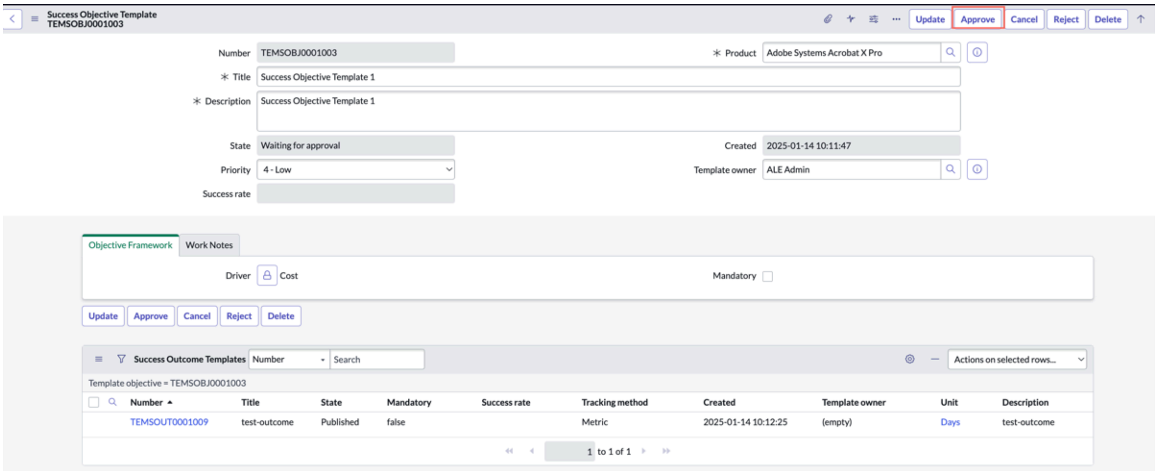
The State field is updated to *Waiting for approval*.

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. Select **Approve** to approve the template. The State is updated to *`Approved`*.

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

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

   Note:

   - After a template has been published, it can longer be modified.
   - Select **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.customer_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 select **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.

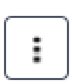
6. You can also use the following options to filter the list of objectives displayed:
    - Search: Enter the title or description to display objectives that meet the criteria.
    - View by drivers: Select an option from the drop down list to view objectives that have the selected driver associated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

    For each objective, you can see the key drivers, success outcomes defined, and the associated product.

7. After selecting the objectives, select **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 can't be deselected. Select the **Edit outcome values** option to add the Base and Target values for the selected outcome and select **Save**.
10. After you have configured the objectives, select **Save Objective**.

    Note:

    - If you select the **Back** button or refresh the page after saving the objective, all the changes will be lost.
    - If you're adding more than one objective, you must save the details for each objective before moving on to the next one.

11. Select **Create** to create the success blueprint.
    The newly created success blueprint now appears on the Success blueprint page. See Success blueprint for details.
12. Select 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. Select the  icon and select one of the following options:

- Add objectives: Select and add any optional objectives you want to add to your success blueprint. Select the objective to be added, select **Next**. Use the Toggle option to select any of the optional outcomes, enter other mandatory details, and select **Save Objective** and then select **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. Select 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 select the icon to drill down to the Success Objective page.
3. Select a Success outcome from the list and select **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 wasn't 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 select **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 aren't 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%

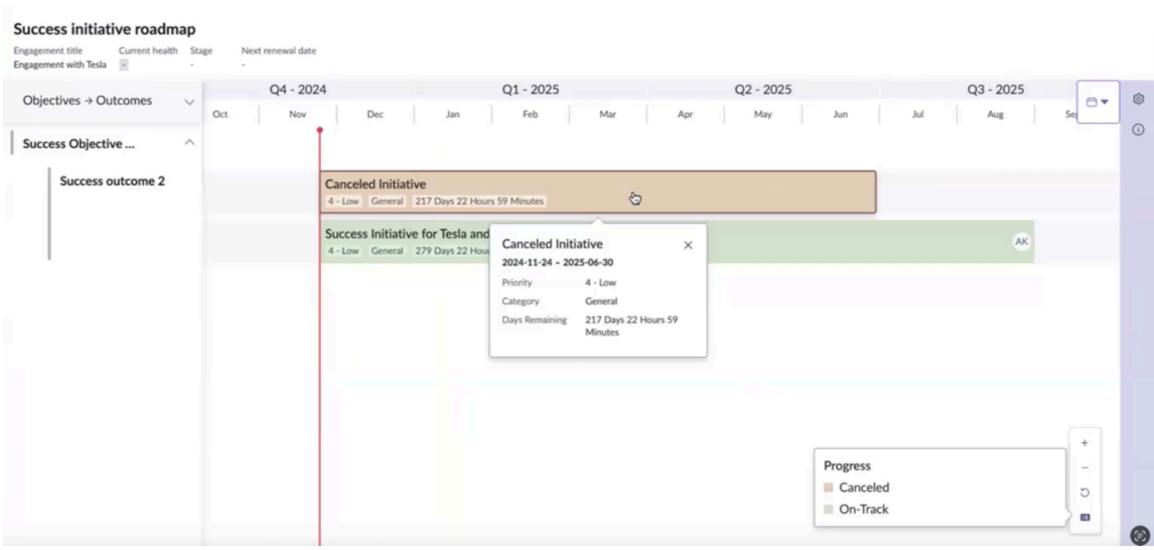
In this case, the success score or the average is 60%.

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. Select 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:

- Select the *`Progress`* option to select the types of initiatives (Canceled, On-Track, Completed) you want to view.
- Select the **Select timescale** icon to view the roadmap by year, month, or quarter.
- Select 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 select **Save**.
  - Select the *`Comments`* tab to add any additional comments.
  - Select the *`Attachments`* tab to add one or more attachments to this initiative.

  make any changes if required and select **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.

Create an implementation record

Track the progress of a partner or customer implementing a product or a service.

Before you begin

Role required: sn_acct_lc.customer_success_application_admin, sn_acct_lc.agent, sn_acct_lc.customer_success_agent

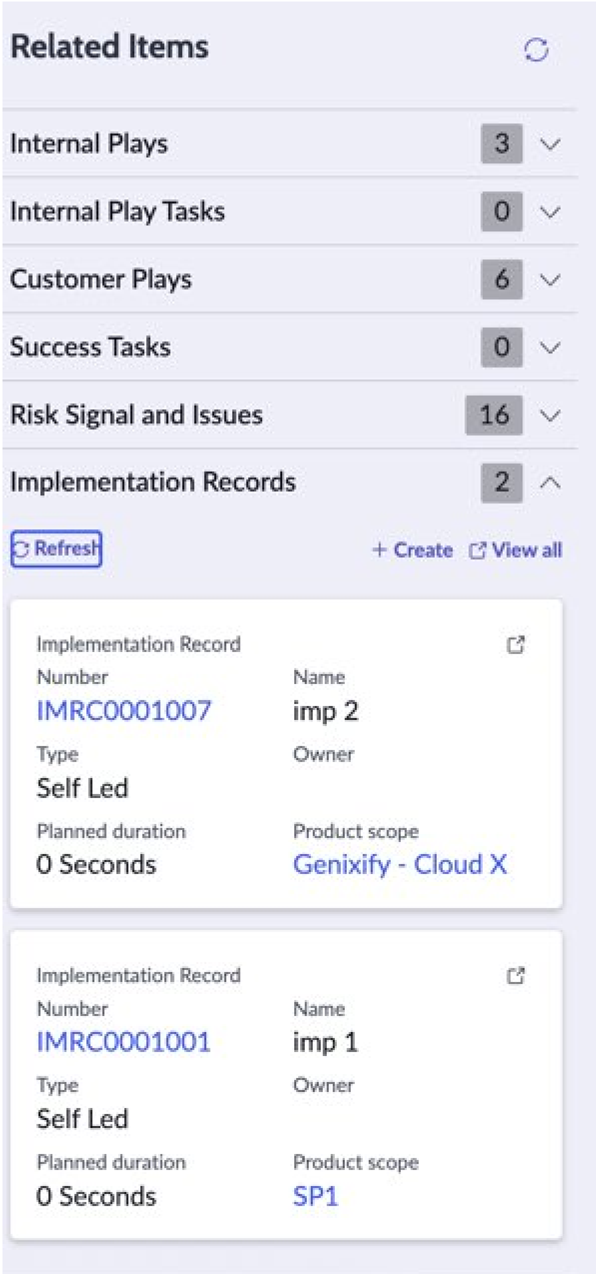
Procedure

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

Field	Description
Number	System generated unique number for the implementation record.
Engagement	The engagement that is being tracked. This is a required field.
Account	The enterprise account associated with the engagement is automatically populated.
Type	Select the type of engagement from the list. This is a required field. ◦ Partner led ◦ Self led ◦ Professional services
Contact	The primary customer contact for this implementation.
Executive sponsor	The customer sponsor responsible for this implementation.
Partner	If it's a partner led implementation, select the contact name from the list.
Partner contact	The primary partner contact for this implementation.
Certified	Indicate if the partner is certified. You can select: ◦ Certified ◦ Not certified
Owner	The owner responsible for the implementation.
State	State of the implementation. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of the implementation. This can be: ◦ Not started ◦ On-track ◦ At risk ◦ Paused

Field	Description
	○ Completed ○ Canceled
Actual start date	The actual start date of the implementation.
Actual end date	The actual end date of the implementation.
Actual duration	The actual duration of this implementation.
Planned duration	The planned duration of this implementation.
Planned start date	The planned start date of this implementation.
Planned end date	The planned end date of this implementation.
Product scope	Select the Sold Product for which the implementation is being tracked.
Capability scope	Select the product capability for which the implementation is being tracked.
Squad	Select the squad members supporting the implementation.
Watch list	Select the users who should be notified of any updates to the implementation record.
Work notes list	Select the users who should be notified of any updates to the work notes field.
Work notes	Enter any internal notes related to the implementation.
Closure information	If the State is **Closed** or **Canceled**, select the Closure code from the list: ○ Successful ○ Unsuccessful ○ Canceled/voided Enter any additional information in the Close notes field.

4. Select **Save** to create the implementation record.
   After the record has been created, you can view the implementation record under the Related Items list on the Engagement home page.
5. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
6. Navigate to the **Customer Success** > **All Engagements** and open an engagement record.
7. Select the **Related Items** link on the Engagement home page.
8. Expand the Implementation Records item to view the list of implementation records associated with the engagement.



You can do the following:

- Select **Create** to create a new implementation record.
- Select **View all** to view all the implementation records associated with the engagement. The list of records is displayed on a separate page.
- Select the to open and edit the implementation record.

Enable integration 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:

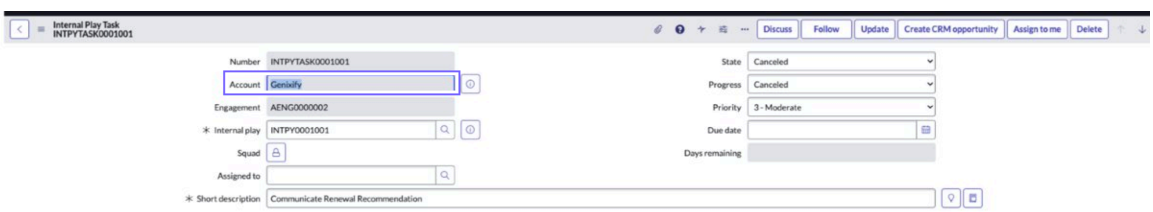
- Creating opportunity for renewals from renewal playbooks.
- Creating task from risk record when renewal date is missing in the account.
- Updating the ServiceNow records when any change is made to the CRM task table.

To set up the integration, follow these steps:

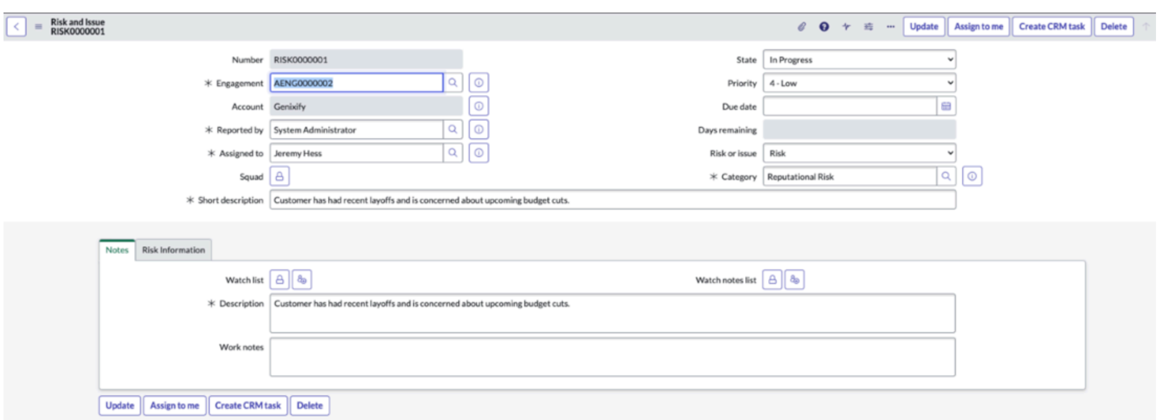
Note: Before you set the integration, you must configured the Recommended Actions application. See Set up recommended actions for account onboarding for details.

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.

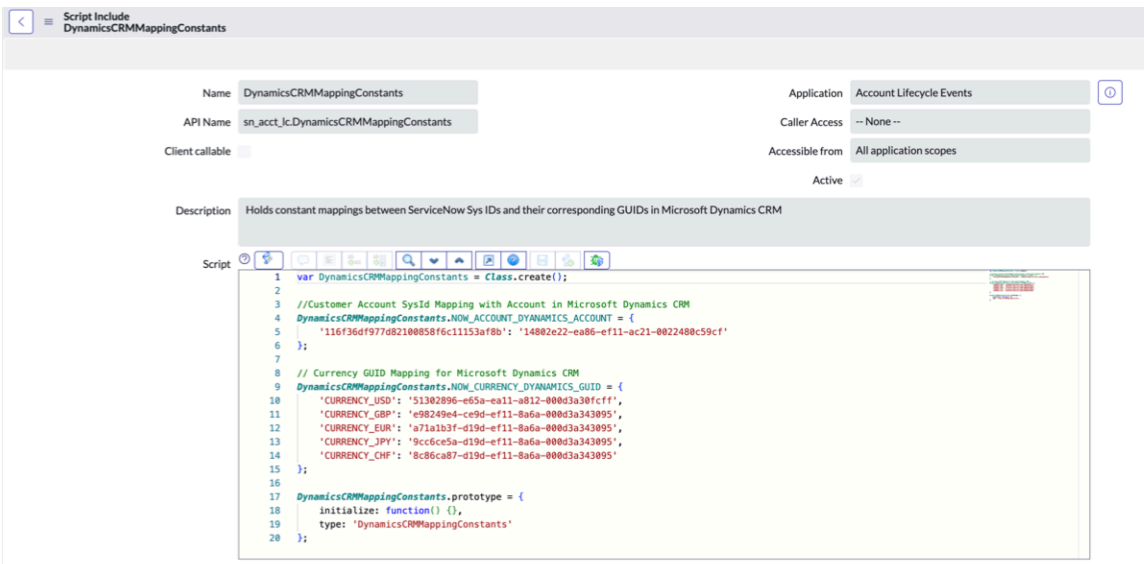
   - Create currencies that correspond to the currencies in the Customer contracts table. While creating currencies, you must add the name of the currency with the symbol in the `TechOnbConstants` script include as follows:

```
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

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.customer_success_agent

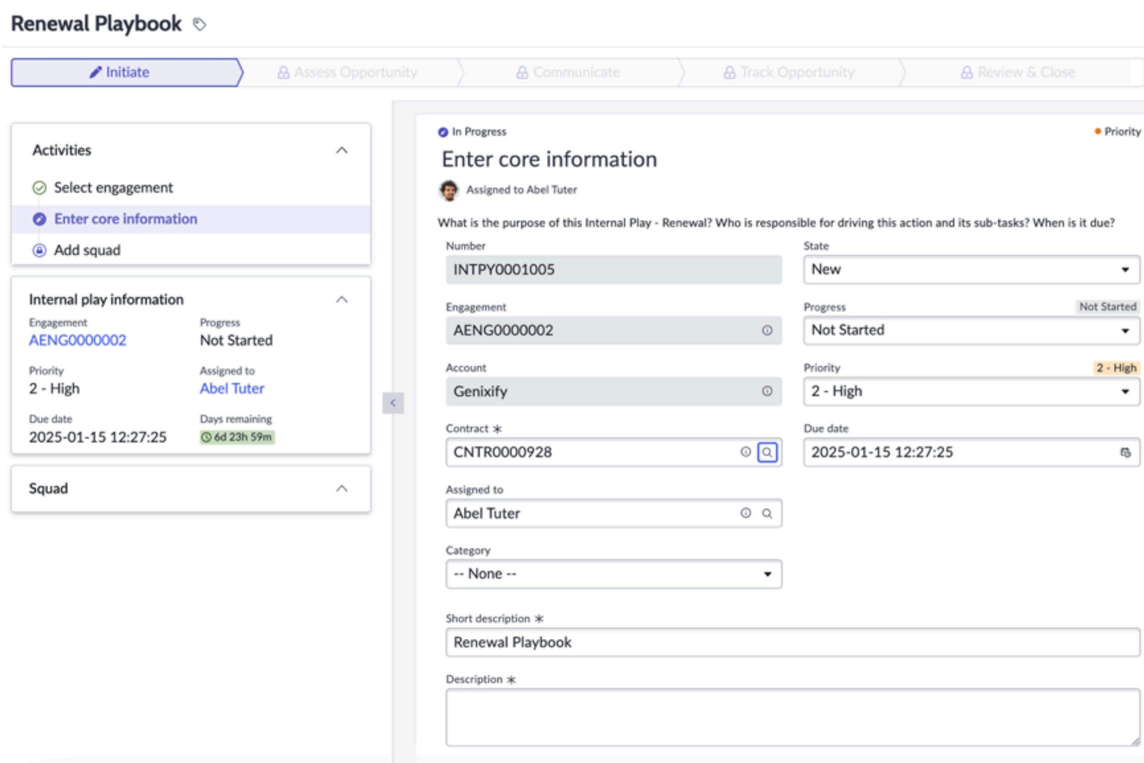
About this task

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

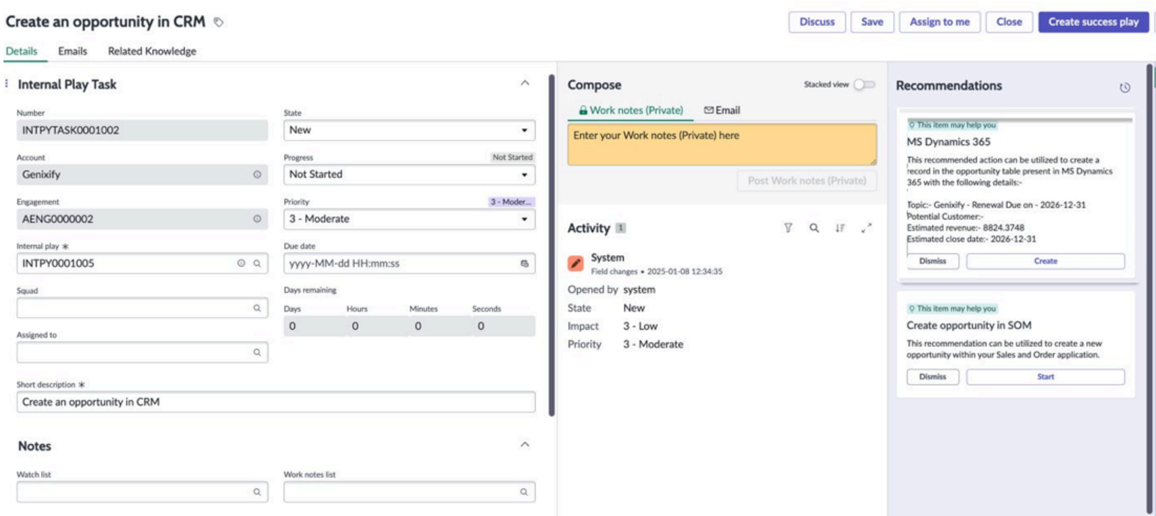
Procedure

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. Select **Create Success Play**.
4. Select **Success Support** category and select the **Simple Renewal Play** card.

5. In the Create Success Play form, specify the Due Date, Assigned to, and Priority and select **Finish**.
   You 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 select **Mark complete**.
8. **Optional:** In the Add squad page, select one or more squad members and select **Mark complete**.
9. **Optional:** In the Assess Opportunity stage, select **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 select **Send and continue** to proceed to the next stage.
11. **Optional:** In the Communicate stage, select **Send email** to go to the next stage.
12. In the Create opportunity page, select **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. Select the **History** icon to see a log of previous recommended actions.



13. Select **Create**.
    You 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 Enable integration with Microsoft Dynamics CRM for details. If the mappings haven't been configured, you see the recommended action but the **Create** option won't 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

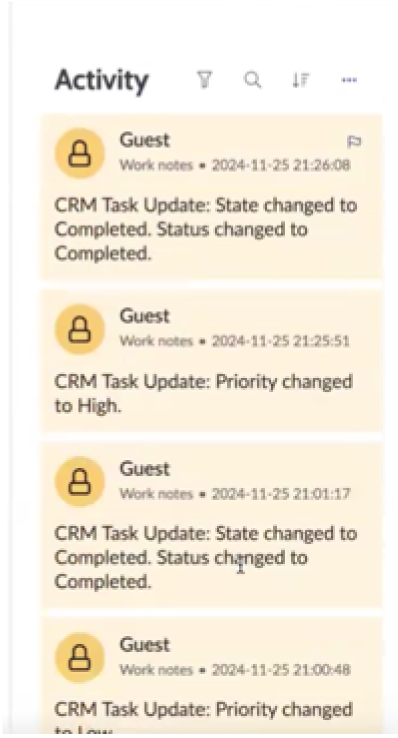
Role required: sn_acct_lc.customer_success_agent

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 Enable integration 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 worknotes 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 an risk record.
   You can see the worknotes that show how the task was updated.



Worknotes 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 Enable integration with Microsoft Dynamics CRM for details.

Use Customer Success Management

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

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

Account onboarding

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

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

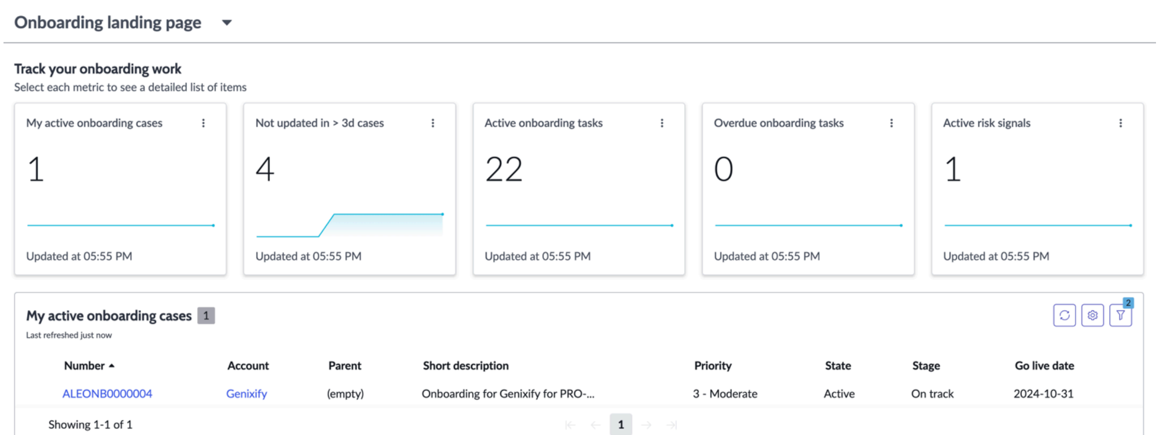
Account onboarding landing page

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.



Select 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 CSM portal

View the account 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**.

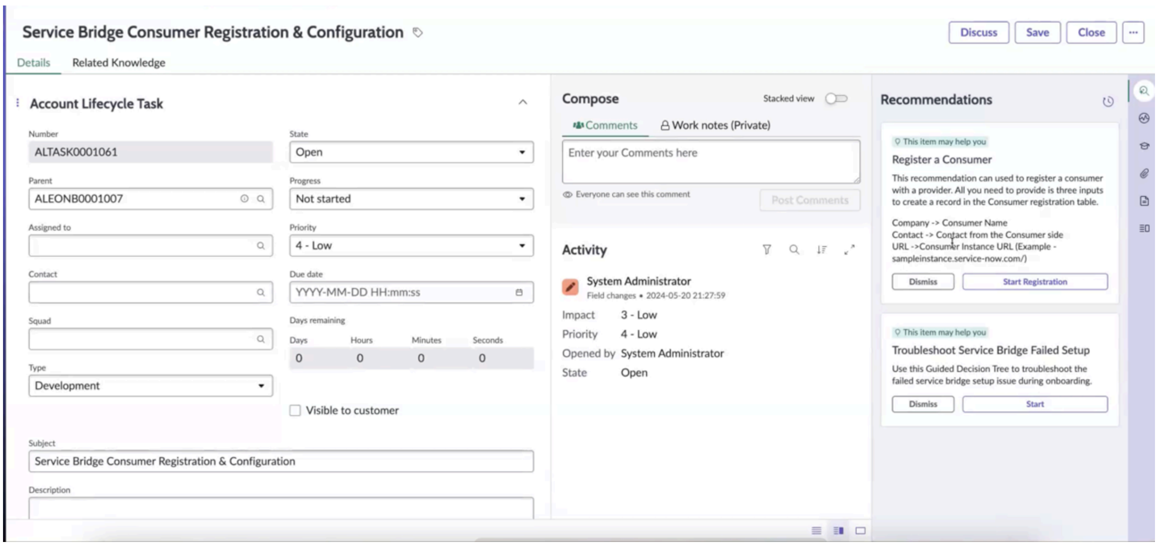
Service Exchange Consumer Registration & Configuration

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.customer_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.

View related items

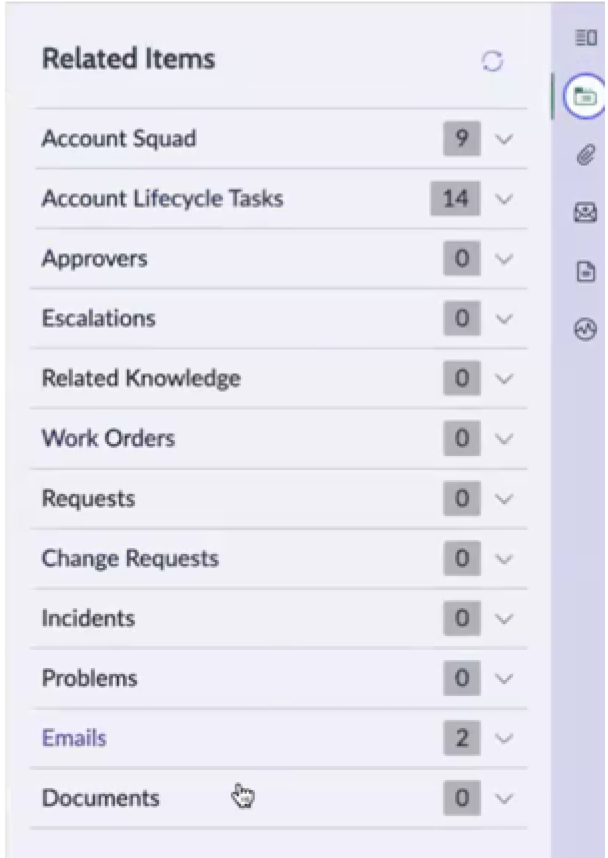
The Related Items component provides access to related list items associated with your account onboarding case.

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.

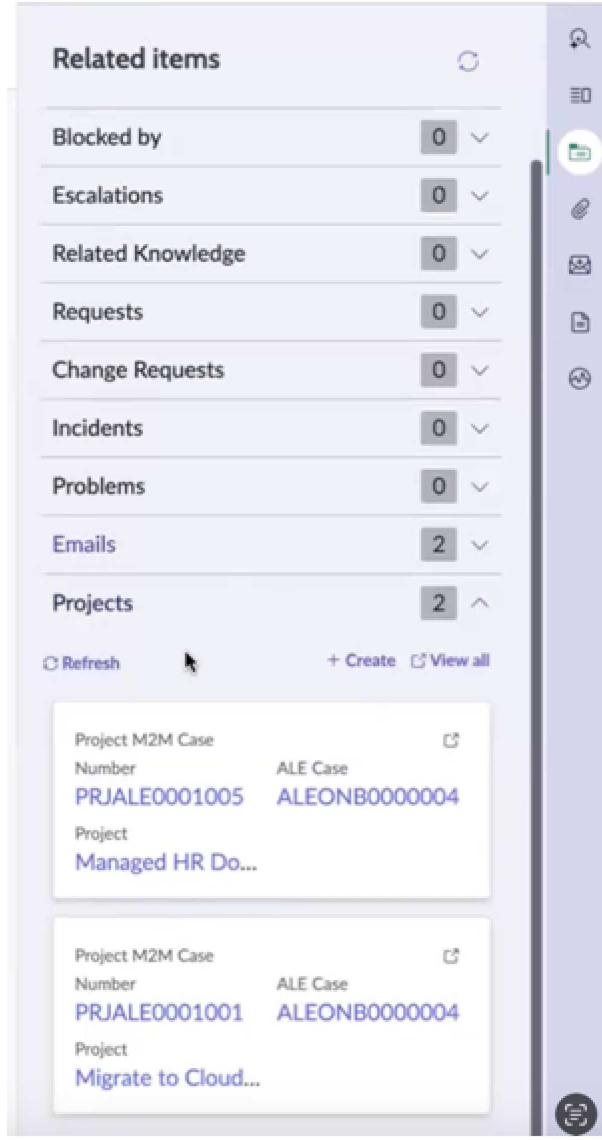
Several related items including account squad, onboarding tasks, emails, documents, and projects are displayed. Related Items include the following actions:

- 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 select **Customer Success Management**. 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 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 Customer Success Management 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.
- Customer Success Management PAD Activities Overview: This article provides an overview of the nine Playbooks activity definitions used to create the activities inside the Customer Success Management 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 Customer Success Management data import task: This article describes the steps required to configure the Customer Success Management 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 won't be able to access the article.

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.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

Success report dashboard overview

The success report dashboard enables customer success managers to oversee and manage the overall customer portfolio.

Customer success managers can use this dashboard to monitor engagement metrics, enable their teams to achieve their goals, and manage their own workload. A user is identified as a manager when the manager attribute is set on their user record—this field determines their position in the organizational hierarchy. Customer success managers can get a comprehensive view of the engagement data for all users within their hierarchy.

- The **Director of customer success** persona, to whom various managers and agents report can view a total of 14 engagements that include:
  - Manager 2: 1 engagement
  - Abel Tuter: 4 engagements
  - Abraham Lincoln: 2 engagements
  - Beth Anglin: 1 engagement
  - John Smith: 4 engagements
  - Jane Doe: 2 engagements

- The customer success manager with the Manager 1 persona can view a total of 7 engagements that include:
  - Abel Tuter: 4 engagements
  - Abraham Lincoln: 2 engagements
  - Beth Anglin: 1 engagement
- The customer success manager with the Manager 2 persona can view a total of 7 engagements that include:
  - Manager 2: 1 engagement
  - John Smith: 4 engagements
  - Jane Doe: 2 engagements

The success report dashboard provides a unified view of all engagements in the hierarchy, enhances productivity, reduces friction, and empowers customer success mangers to make data driven decisions effectively. For more details, see Success report dashboard.

Success report dashboard

Get an overall view of all your engagement and team status overview, risk indicators, onboarding and adoption insights, and expansion and renewal metrics.

To view this page, follow these steps:

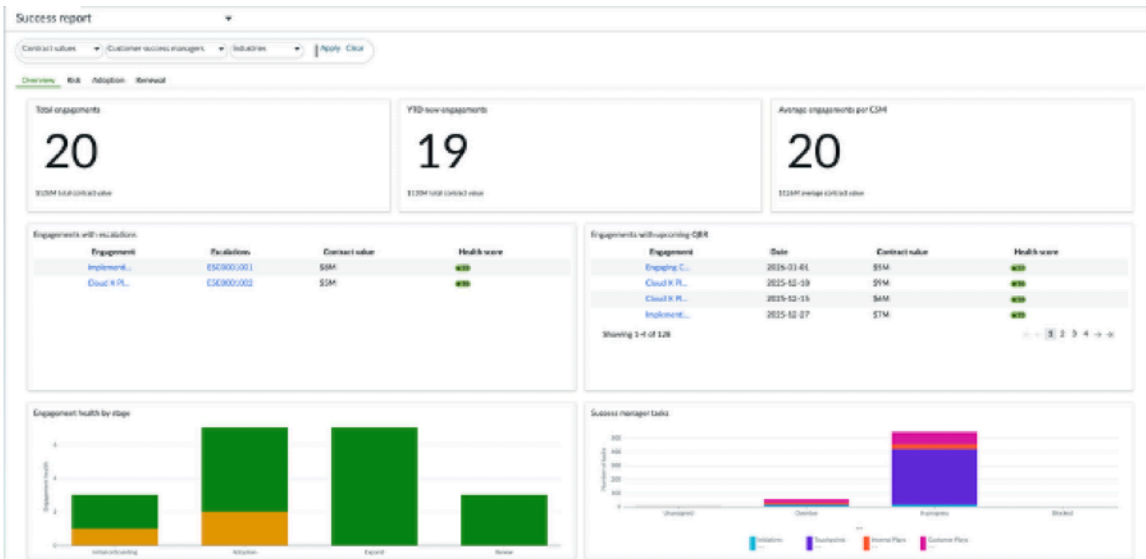
1. Login as a user with either the `sn_acct_lc.success_manager` and `sn_acct_lc_customer_success_agent` roles.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** to view the Success report page.

Note:

- The engagements listed on the success report dashboard are based on the hierarchy of the logged in user. Users with the *sn_acct_lc.success_manager* role can see an aggregate view of all engagements handled by all customer success managers in the hierarchy. Users with the *sn_acct_lc_customer_success_agent* role can see an aggregate view of all their assigned engagements. For more details, see Success report dashboard overview.
- Select filters from the following drop down lists and click **Apply** to narrow the list of engagements displayed:
  - Contract values: Select one or more contract values from the drop down list. The local currency is automatically selected based on your system settings. The contract value ranges are based on the following properties in the *TechOnbConstants* script include:
    - TechOnbConstants.CONTRACT_VALUES_ID
    - TechOnbConstants.CONTRACT_VALUES
  - Customer success managers: The list of users displayed here is based on the role of the logged in user.
    - Customer success agent: In this case, only the user who has logged in will be displayed.
    - Customer success manager: All the customer success agents in the hierarchy are displayed.
  - Industries: The list displayed is based on the customer accounts of all the engagements managed by customer success manager of the logged in user.

The Success report page contains the following tabs:

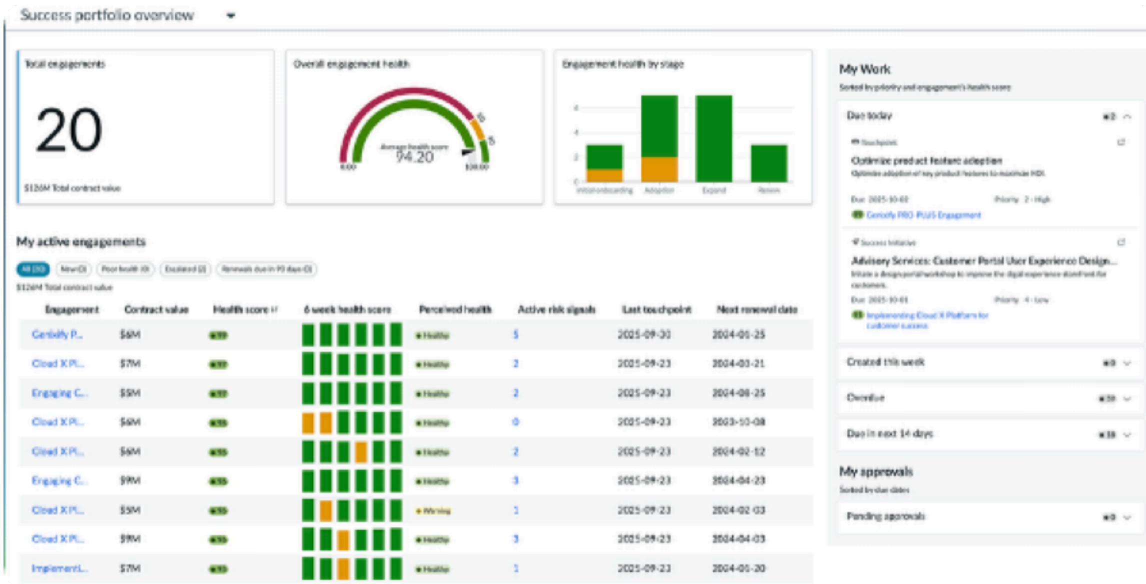
- Overview: Provides an overview of the team health and engagement metrics.
- Risk: Identifies potential issues that can impact engagement health.
- Adoption: Provides details on customer progress on onboarding and product adoption.
- Renewal: Lists key metrics related to revenue growth opportunities and contract renewals.



Overview (Success report)

This tab provides a high-level overview of the success portfolio. You can click on any of the sections in this page to drill down to the Details page. It includes the following details:

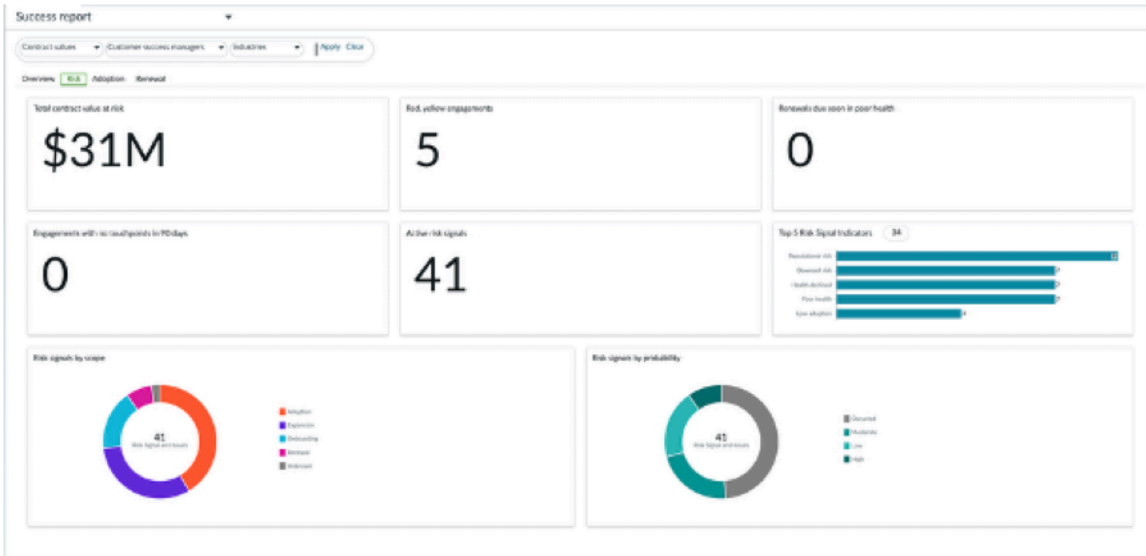
- Total engagements: Total number of engagements managed by the customer success manager.
- YTD new engagements: The number of new engagements as of the current year.
- Average engagements per CSM: The average number of engagements per customer success manager in the success portfolio.
- Engagements with escalations: Shows a list of engagements with escalated accounts.
- Engagements with upcoming QBRs: Shows a list of engagements with upcoming QBRs.
- Engagement health by stage: Shows engagements grouped by the stage in the engagement lifecycle (onboarding, adoption, and so on).
- Success manager tasks: Shows the tasks handled by the success managers grouped by status (in progress, overdue, and so on).



Risk

This tab provides an identification of potential issues that could impact engagement metrics. It includes the following details:

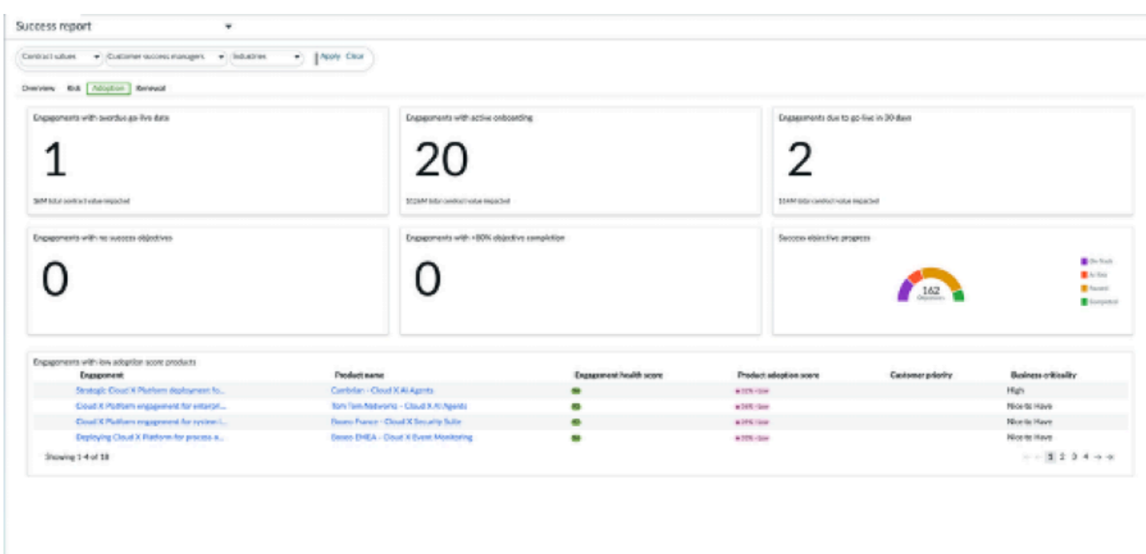
- Total contract value at risk: Total value of contract that has been impacted for all active risk signals
- Red, yellow engagements: The number of engagements with a red or yellow perceived health score.
- Renewals due soon in poor health: The number of engagements with a poor health score that are due for renewal.
- Engagements with no touchpoints in 90 days: Engagements which have no upcoming touchpoints in the next 90 days.
- Active risk signals: Shows the number of risk signals.
- Top 5 Risk Signal Indicators: The top risk signal categories such as low adoption, poor health, and so on.
- Risk signals by scope: Risk signals grouped by scope or state of the engagement such as adoption, onboarding, and so on.
- Risk signals by probability: Risk signals grouped by probability such high, moderate, low, and so on.



Adoption

This tab shows the current customer adoption status. It includes the following details:

- Engagements with overdue go-live date: Engagements with overdue go-live dates.
- Engagements with active onboarding: List of engagements that are in the on-boarding stage of the engagement life cycle.
- Engagements due to go-live in 30 days: List of all engagements that are due to go-live in 30 days.
- Engagements with no success objectives: Engagements for which no success objectives have been defined.
- Engagements with >80% objective completion: List of engagements for which more than 80% of the success objectives have been completed.
- Success objective progress: Success objectives grouped by state such as new, on-track, at risk, completed, and so on.
- Engagements with low adoption score products: List of products with a low adoption score and the associated customer and business priority. See Product adoption and capability usage for details.



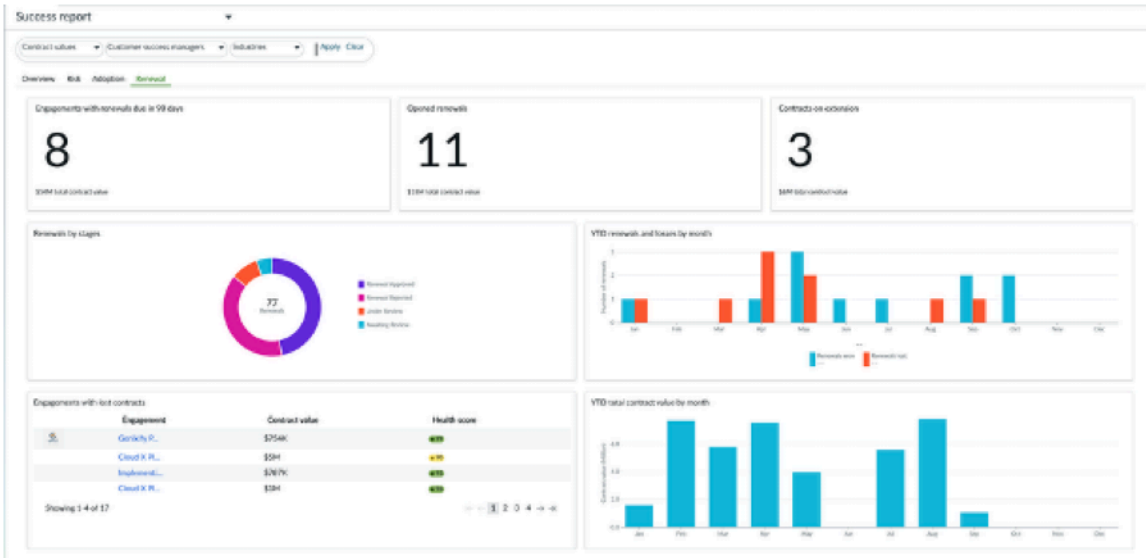
Renewal

This tab shows the renewal details for all contracts associated with the engagements. It includes the following details:

- Engagements with renewals due in 90 days: List of engagements with contracts that are due for renewal in 90 days.
- Opened renewals: List of all active or expired contracts where state equals:
  - Under review
  - Awaiting review
  - Active and extension approved
- Contracts on extension: Contracts where Extension is Approved and State is Active.
- Renewals by stages: Renewals grouped by stage which can be one of the following:
  - Awaiting review
  - Renewal approved
  - Renewal rejected
  - Under review
- YTD renewals and losses by month: Monthly breakdown of renewed and rejected contracts, year-to-date.

  Note: The date used to plot the x-axis on the graph is based on one of the following:

  - If Sales Customer Relationship Management is installed, an opportunity is created for each contract. For opportunities with type **Renew**, the stage of the contract is set to **Closed won** or **Closed lost** indicating whether the contract had been renewed. The Actual Closed Date in the Opportunity record is used to plot the X axis. For more details, see Opportunity Management.
  - Date specified in the **Renewal finalized on** field in the Contracts table. The Renewals won and Renewals lost bar charts show the month in which the renewal was either approved or rejected.
- Engagements with lost contracts: List of engagements with contracts that were rejected or not renewed.
- YTD total contract value by month: Monthly breakdown of total contract value, year-to-date.

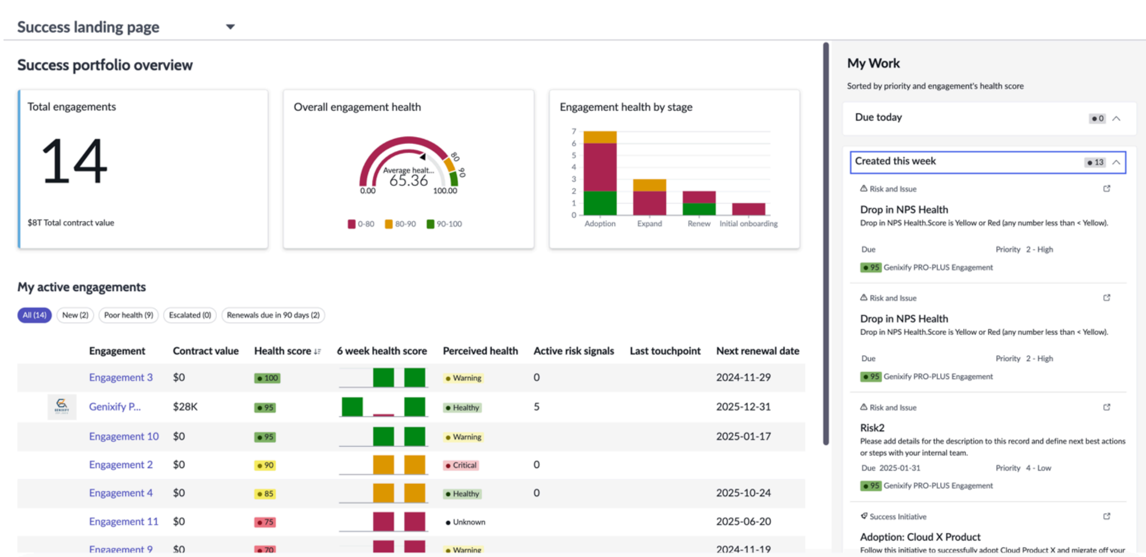


Success portfolio dashboard

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.customer_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

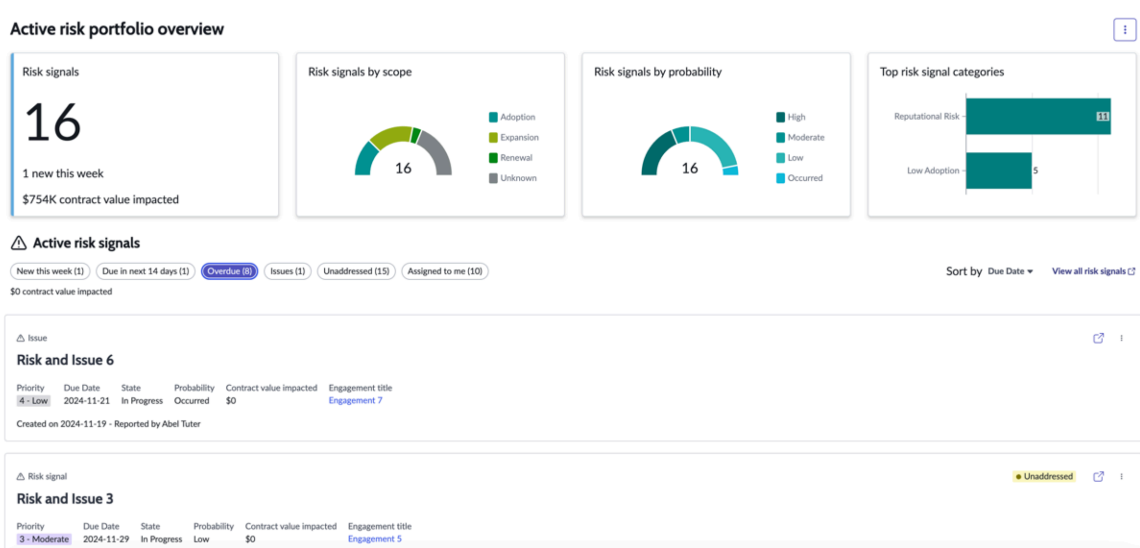
  Note: The colors used in the health score displayed for each engagement is derived from the metric based color banding defined in the Color Banding table. See Setup the color banding table for details.

  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're associated.

Login as a user with the `sn_acct_lc.customer_success_agent` or `sn_acct_lc.agent` role and navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select 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. Select 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 Customer Success Choice record.

You can do the following:

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

  Select the ⋮ icon to Create success play manually.

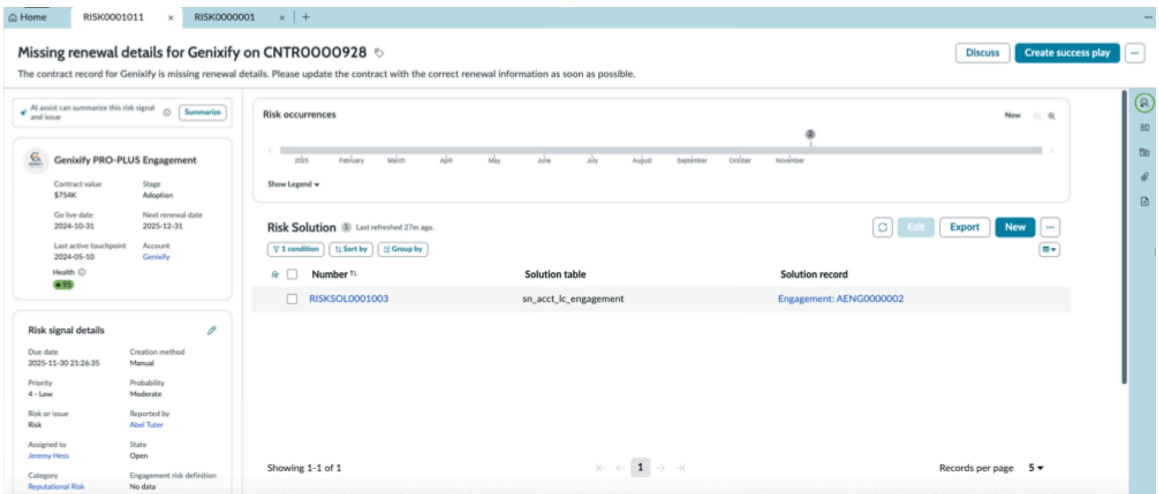
  Select the icon to drill down to the detailed record page.

Risk signal 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.customer_success_agent` or `sn_acct_lc.agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Risk Signal and Issues** and select **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 the details.
- Risk occurrence timeline: List of risk occurrences based on the scheduled job. This includes the dates on which the scheduled job was created, executed, the current value, engagement health, and the threshold value.
- Summarize: Generates a summary from a risk signal and issues summarization record and all associated tasks. See Summarize a risk signal and issues using Now Assist for Telecommunications, Media and Technology (TMT) to generate the summary.

The following options are available:

- Discuss: Select **Discuss** to start a sidebar discussion about this risk signal. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record. Select **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: Select **Export** to export the risk occurrences or solutions to an Excel file.

Contextual side panel component

The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Risk Signal and Issues record page includes the following tabs.

Tab	Description
Recommended Actions	The Recommended Actions tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the risk record short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can do the following: • Select a source to see search results of that type. • Filter the list of search results. • Sort the list of search results. • Open the search results in full view in a record subtab. • Take the following actions: ◦ View and attach article ◦ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful. • View successful actions by selecting the Actions history icon. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.
Activity Stream	The activity stream component displays a list of the activities occurring on a risk record.
Related Items	The Related Items tab provides access the risk record-related lists. New risk can be created from the related items.

Tab	Description
	The risk signal and issues record page incorporate related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed. An indicator displays the number of risk records available in a related list. When expanded, the records in a related list are displayed in card format. The Related Items tab shows the list of items: • **Emails**: View the consolidated emails that are related to the risk record. • **Risk Impacted Records**: View the records that are related to the risk record. • **Risk Occurrences**: Navigate to the risk record. • **Documents**: View the documents that are related to the risk record.
Template	The Templates tab provides access to available form templates that enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a record such as an incident or change.
Attachment	The Attachments tab provides access to risk record-related attachments. From this tab, agents can view and download attachments.

Associate risk signals

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

Before you begin

- Role required: sn_acct_lc.customer_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. Select **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.

Field	Description
Solution table	The solution you select here's 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. Select **Submit** to create the risk signal to solution relationship.
   This enables you to track the risk and view the proposed solutions to address the risk.

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:

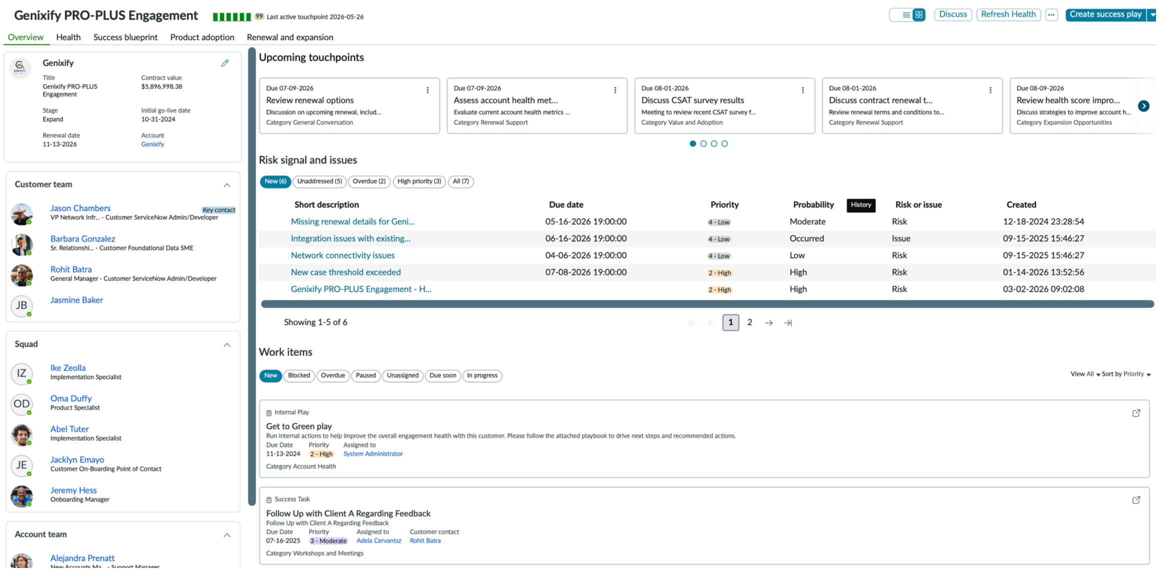
1. Login as a user with the `sn_acct_lc.customer_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Engagements** and select **Number** column to open the engagement record. You can also navigate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

The following options are available:

- Discuss: Select **Discuss** to start a sidebar discussion about this engagement. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this engagement. Select **Open record** and start the discussion. When the discussion has been completed, you can see the details in the **Activity stream**.
- Refresh Health: Select 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 customer play.
- Touchpoint: See Create a touchpoint.

The Engagement record page contains the following tabs:

- **Overview**
- **Health**
- **Success blueprint**
- **Product adoption**
- **Renewal and expansion**
- **Engagement hierarchy**



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 six weeks and the last active touchpoint.
- Engagement details: Shows the contract value, engagement stage, go-live date, account with which it's associated, and the renewal date. Select the Edit icon to modify the engagement details and select **Save**.
- Customer team: Shows the key customer contact that 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. Select 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, select one of the work items filters like New, Blocked to view specific items in the list.

Health

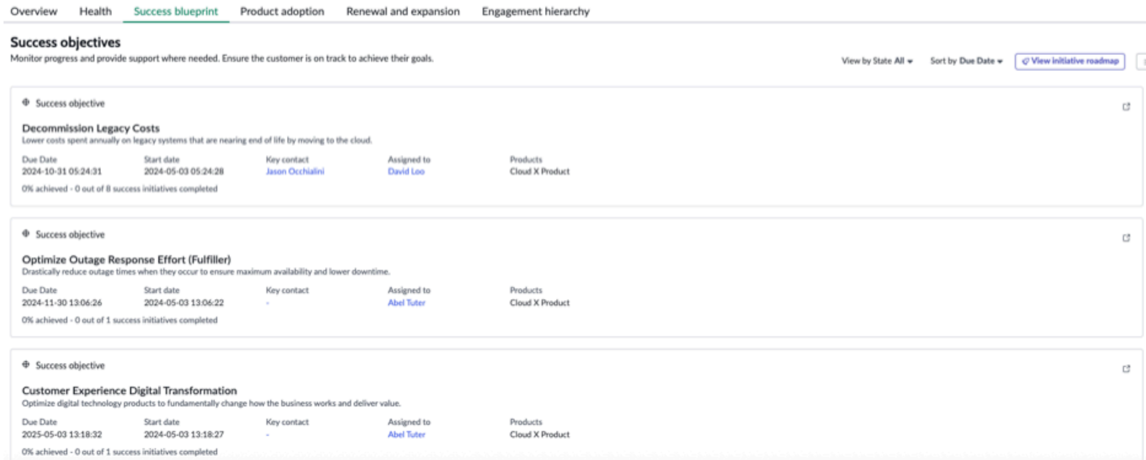
In this tab, you can see the current health score and the health of the engagement over the last 12 weeks. This helps identify gaps and issues that need attention. Select **Refresh Health** to view the updated health score.

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

Success blueprint

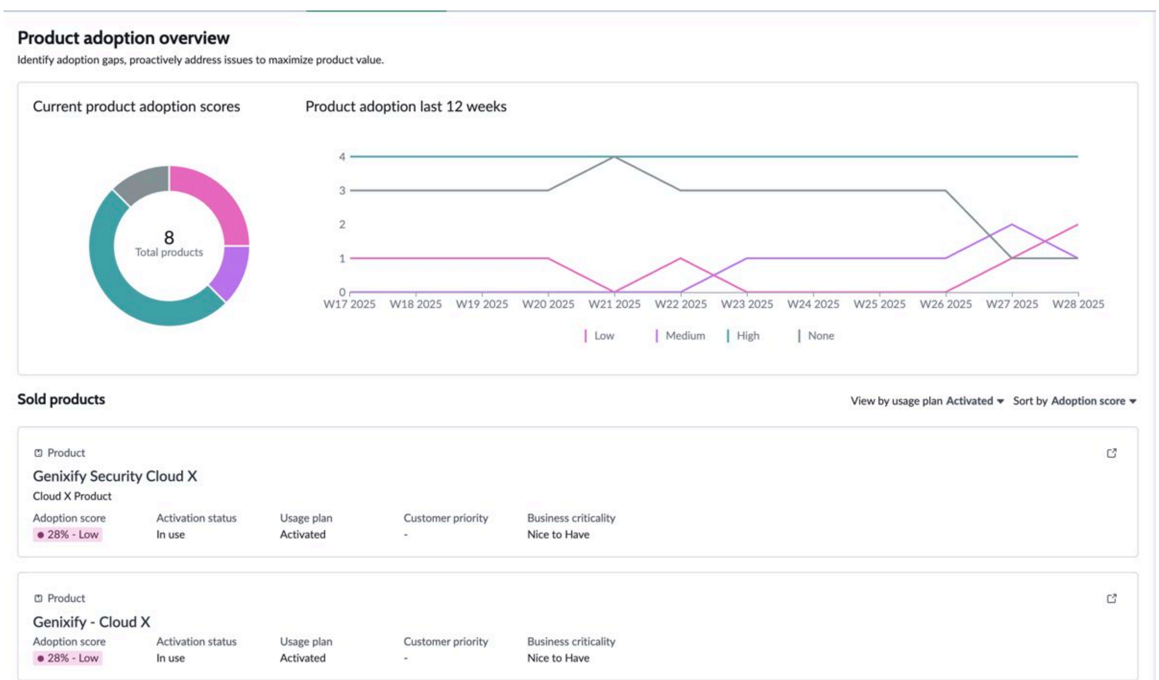
In this tab, you can view the success objectives associated with this engagement. You can view the high-level details of each success objective including Due date, Start date, Key contact, Assigned to, and Products. If the success blueprint hasn't been defined, select **Create success blueprint**. See 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
- Select the icon to drill down to the Success objective record page.
- View initiative roadmap: Select 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.



Product adoption

In this tab, you can view the product adoption score for all applicable sold products associated with this engagement. The adoption score is determined using the calculated metrics that have been configured for the sold products. See Define a calculated metric data source for more details.



The following details are included:

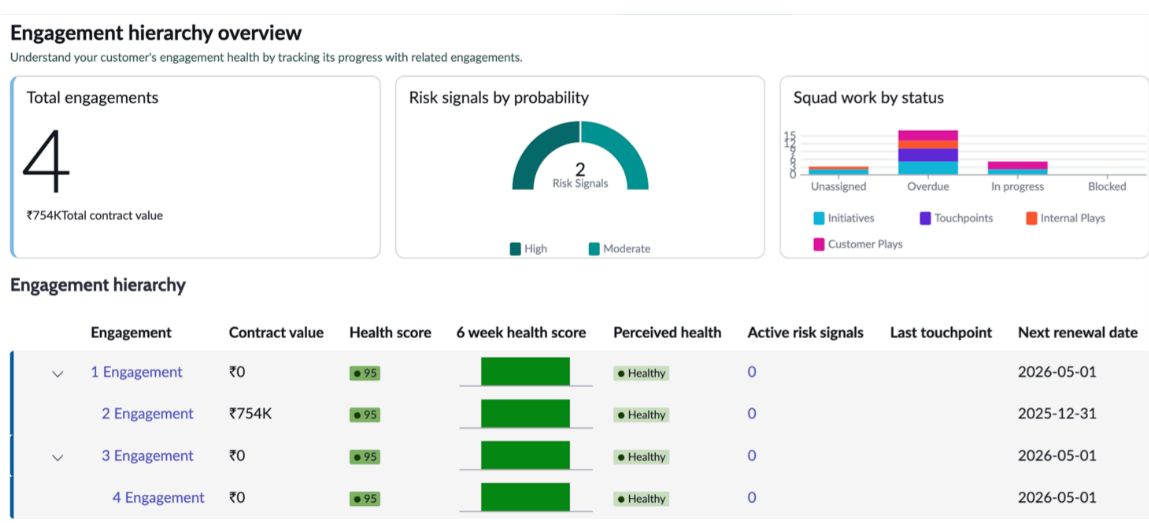
- The chart displays product adoption scores across the past 12 weeks, broken down by week. By hovering over data points, you can view the quantity of products sold within each adoption category (Low, Medium, High, and None) for any given week.
- The pie chart shows a snapshot of current adoption score distribution as of today's date. Select Total products to drill down to view the Product Usage list. You can drill down to a specific product usage record.
- The list of sold products associated with this engagement is displayed. Select to drill down to the Product usage record page.

- View by: You can filter the list displayed by:
  - All
  - Activated
  - Planned
  - No plan
  - Deactivated
- Sort by: You can sort the list by:
  - Customer priority
  - Adoption score
  - Business criticality
  - Activation status

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 select the link to drill down to the Contract page.

Engagement hierarchy



This tab provides an overview of customer's engagement health. This tab is a conditional tab by default isn't visible. To view this tab, one child engagement must be available in the related engagement. It includes the following details:

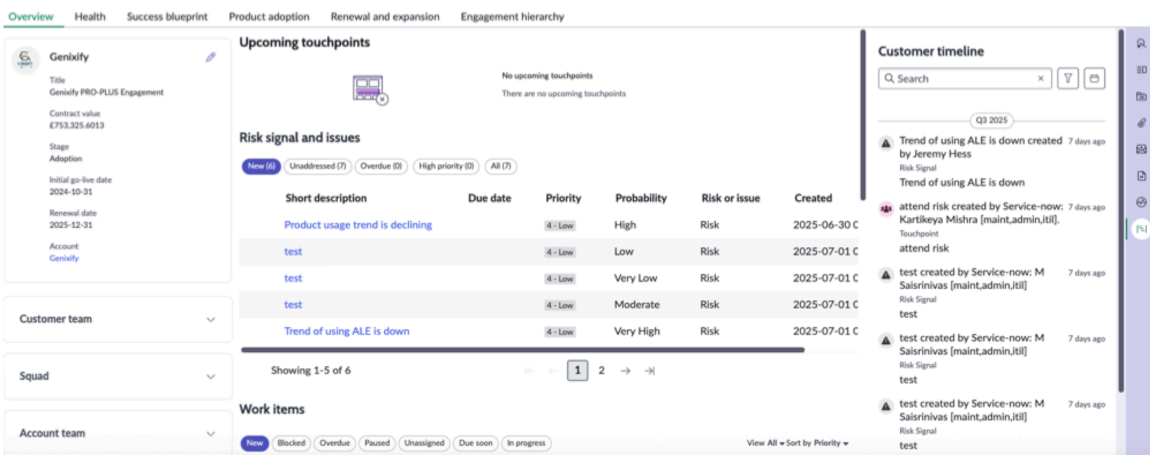
- Total engagements: Shows the total number of engagements and total contract value related to the account.
- Risk signals by probability: Shows the risks associated with this account.

- Squad work by status: Shows the work status of the team involved with this account.
- Engagement hierarchy: Shows the active engagements for this account. In the engagements, shows the parent and child relationship.

Any hierarchy that forms a cycle isn't a valid hierarchy.

Customer timeline

The customer timeline tracks and shows all the related activities of the engagement record. To support the application 23 activities are shipped out of box in the engagement record.



To configure the activities in the engagement record, see Configure activity types for the Customer History view.

Contextual side panel component

The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Engagement record page includes the following tabs.

Engagement record page tabs in the contextual side panel

Tab	Description
Recommended Actions	The Recommended Actions tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can do the following: • Select a source to see search results of that type. • Filter the list of search results. • Sort the list of search results. • Open the search results in full view in a record subtab. • Take the following actions:

Engagement record page tabs in the contextual side panel (continued)

Tab	Description
	◦ View and attach article ◦ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful. • View successful actions by selecting the Actions history icon. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.
Activity Stream	The activity stream component displays a list of the activities occurring on a case record.
Related Items	The Related Items tab provides access the case-related lists. The Engagement record page incorporates related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format.
Attachment	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body.
Template	The Templates tab provides access to available form templates that enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a record such as an incident or change.
Record Information	The Record Information tab shows overview of the engagement record.
Customer timeline	The Customer timeline tab shows visual display of the Engagement records activities.

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.customer_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 select 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. Select **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. Select the **Number** column to drill down to the Success Initiative record page.

Primary success outcome record page

A primary 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.customer_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 Primary success outcome record.

This page contains the following tabs:

- Details: See Create a primary 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.

View product usage and capability data

View the product usage and capability data for a specific sold product over a period of time.

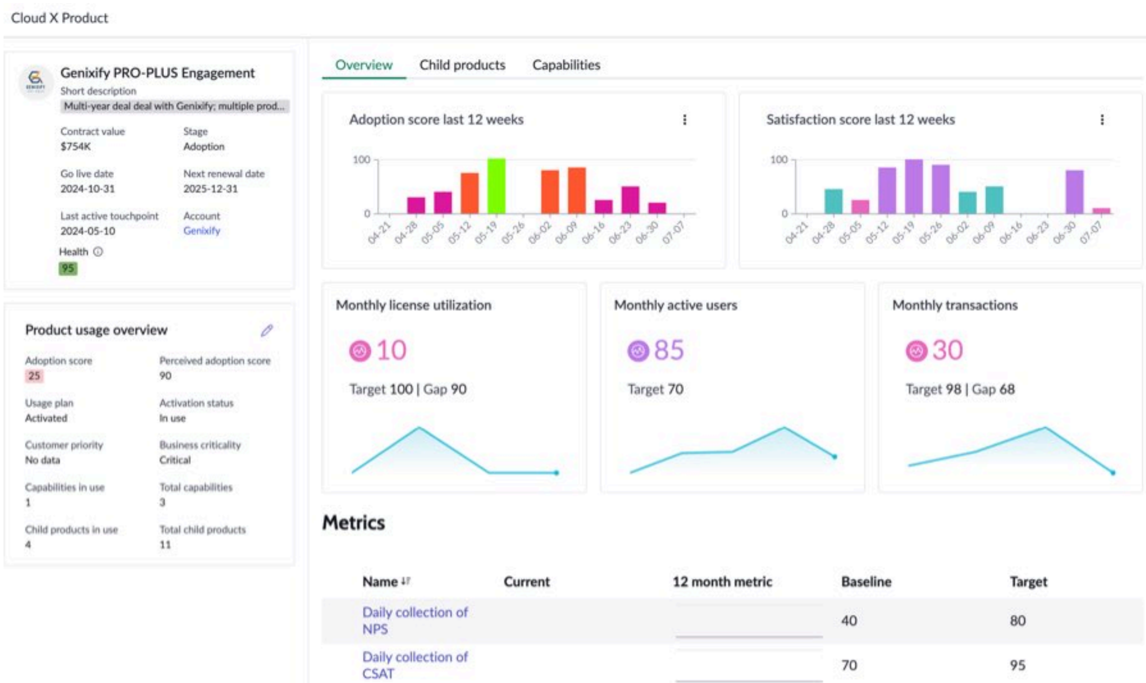
Product usage data provides insights into how customers interact with a product. It encompasses various metrics and data points that help understand how effectively a product is being adopted and used. This data helps customer success managers to analyze the data, identify areas for improvement, and make informed decisions. The data that appears on this page is configured using the DEC Insights Visualizations table. See Configure DCE Visualizations for details.

1. Login as a user with the `sn_acct_lc.customer_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.

3. Navigate to **Customer Success** > **All Engagements** and select **Number** column to open the engagement record.
4. Navigate to the Product adoption tab. Select an engagement from the Sold products list and select to navigate to the Product usage page.

This page contains the following tabs:

- Overview
- Child products
- Capabilities



The Overview tab displays weekly breakdown data for the following metrics:

- Adoption score over the last 12 weeks
- Satisfaction score over the last 12 weeks
- Number of licenses utilized in the month
- Number of monthly active users
- Number of monthly transactions

The Metrics section lists all the auxiliary metrics that contribute to the product usage.

The Child products tab displays a list of all child products associated with the parent sold product. Click on a child product link to drill down and view the usage data for that product.

The Capabilities tab displays a list of all capabilities associated with the selected sold product. Click on the Name to drill down to the Capability usage page.

This page shows the capability adoption score over the last 12 weeks. The metrics that contribute the usage data are also displayed.

View customer success cases in the CSM 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.customer_success_agent
- sn_acct_lc.customer_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.customer_success_agent and for customers with sn_acct_lc.customer_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.customer_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.customer_success_agent and for customers with sn_acct_lc.customer_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.customer_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.customer_success_agent and for customers with sn_acct_lc.customer_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.customer_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.

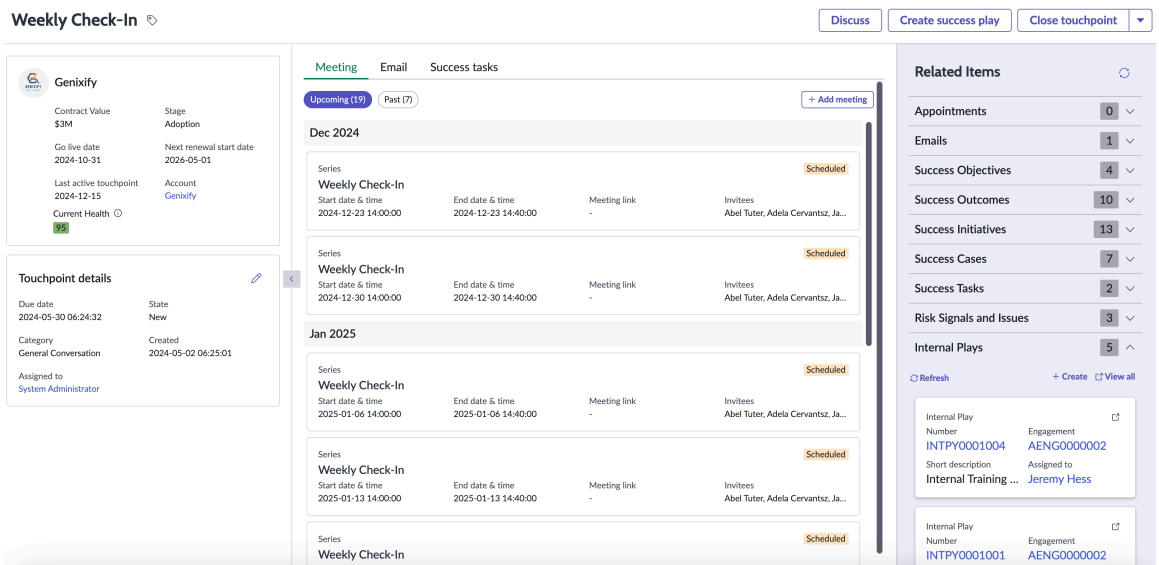
All the touchpoints related to the selected account are displayed.

All the activities related to the case task are displayed.

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 ensure that the internal and external teams are aligned on the objectives and outcomes of the engagement.



The following options are available:

- Discuss: Select **Discuss** to start a sidebar discussion about this touchpoint. In the pop-up window, select the participants who must participate in the discussion, enter a brief message, and select **Start discussion**. A window appears with a link to the record for this touchpoint. Select **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're prompted to enter the required fields. Select the **Edit** icon in the Touchpoint details panel, enter the required fields and select **Save**. Select **Close touchpoint** after filling in the required fields. Select the Closure code and Close notes and select **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 select **Cancel**. If all other required fields have been filled in, you see a confirmation message indicating that the touchpoint has been canceled. If any required fields haven't been filled in, select the **Edit** icon in the Touchpoint details panel, enter the required fields and select **Save** to cancel the touchpoint.

If the touchpoint is deleted, all the associated meetings of the touchpoint are deleted.

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. Select the pencil icon to modify the details and select **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. Select **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 remains in this state until 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 necessary.
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 can’t 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
	• Twice a week • Daily • Monthly • Quarterly • Weekly
Repeat until	This field appears only if you select a value in the Cadence field. Specify the date until 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 check box to enable virtual meetings.
Video software	Select your virtual meeting provider such as Zoom or Google Meet from the list.
Meeting link	This field is automatically populated if you select Zoom in the Video software field. For details on setting up and configuring Zoom, see Configure Zoom to create a touchpoint meeting summary.
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	Select **Add file** to upload one or more attachments with the meeting invite.

Select **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's 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 shouldn't 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 impact only upcoming meetings.
- If a meeting series is rescheduled to an earlier date, all future occurrences are 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:

- Select a meeting to modify the details. If the meeting is part of a series, you can either edit one of the occurrences or select **Edit series** to update the entire meeting series.
- Select **Cancel occurrence** to cancel the selected meeting or select **Cancel series** to cancel the entire meeting series.
- Select **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 select **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 can't schedule any new meetings.
  - Emails and success tasks can't be added for the closed or canceled touchpoint.

Important: The following changes have been made in the Touchpoint tables in the Zurich release:

Table name	Field name	State
Meeting Details (sn_meeting_mgmt_meeting_details)	Meeting password	Added
Virtual Meeting Details (sn_meeting_mgmt_virtual_meeting_details)	• Meeting Instance ID • Meeting actual start date	Added
Meeting Details (sn_meeting_mgmt_meeting_details)	• Meeting link • Meeting password	Deprecated

Run the **Migrate Meeting Fields** script to migrate the Meeting Id, Meeting link and Meeting password fields data from the Virtual Meeting Details table to the Meeting Details table.

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 is auto populated with the email address of the Contact and the subject of the account.

You can:

- Select the `Expand email` icon to expand the email. You add or delete the email ids and update the subject if necessary.
- Select the `Flag` icon to mark this email as important.
- Select the `Open draft in a tab` icon to view the email in a new tab. Select the `View drafts` icon and then **Manage draft** to view draft versions of the email. Select a draft from the list, select **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 set up the Email composer (mini). See Email composer (mini) UIB setup for the details.
- Select the Touchpoint Email Template in the right panel and select **Apply Template**. Your email is formatted according to the touchpoint template that you have applied.
- Select **Attach file**. You can attach a file either from your computer or from the touchpoint record. Select the file to be attached and select **Add** to attach the file with your email.

Select **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. Select **New** to create a new success task for this touchpoint. The Create a new success task page is displayed.
2. Enter the details on this page and select **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.customer_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select 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.
- Select the icon to sort the list either by Contract value, Health score, or Last updated touchpoints.
- Select **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.
- Select **Create Touchpoint** to create a new touchpoint. See Create a touchpoint for details.

Configure Zoom to create a touchpoint meeting summary

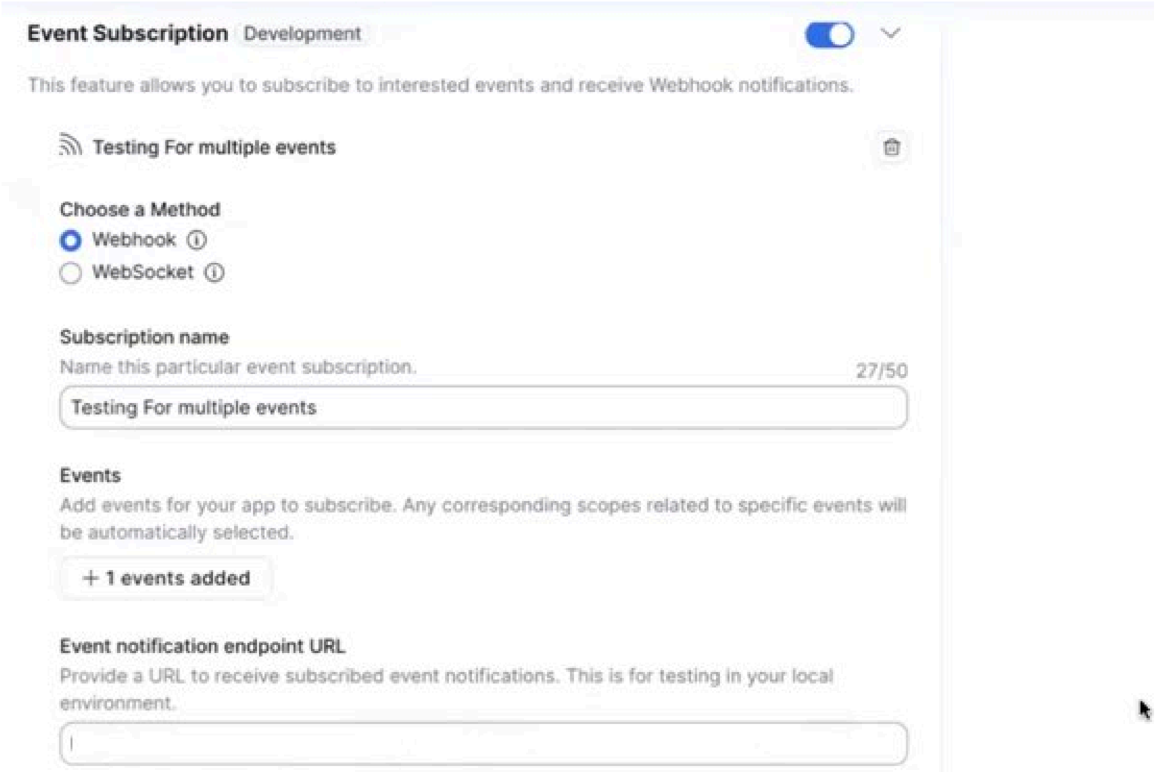
Set up the Zoom spoke integration and the bi-directional web hook to generate summaries for virtual touchpoint meetings.

Before you begin

Role required: sn_acct_lc.customer_success_application_admin

Procedure

1. To configure the Zoom spoke, follow the steps listed in Set up the Zoom spoke.
   A token is generated for Zoom connectivity.
2. Navigate to **All** > **System Properties**, edit the *sn_acct_lc.zoom_integration_user_id* property, and specify the Zoom account User ID in the Name field.
   These steps enable you to generate a Zoom meeting link when you create a touchpoint meeting.
3. Navigate to **All** > **Zoom Spoke** > **Zoom Webhook Validations** and select **New**.
4. Enter the following details:
   - Name: A unique name to identify the webhook validation record. For example, Zoom spoke webhook validation.
   - Secret token: Secret token of the app in your Zoom account.
5. Log in to your Zoom marketplace, open the General app, select **Access** > **Event Subscriptions**.



6. Add the **Meeting summary has been completed** event and specify the **Event notification endpoint URL**.
   The next step is to register a Zoom webhook in ServiceNow to track events occurring in Zoom.
7. In your ServiceNow instance, navigate to **All** > **Zoom Spoke** > **Zoom Webhook Registries**.
8. Select **New**.
9. On the form, fill in the fields.

Field	Description
Trigger Type	Type of the Zoom event that triggers the subflow. Select **Summary Completed** from the list.
Secret token	Secret token from your Zoom account used for validating event notification.
Subflow Name	Subflow that is to be triggered when the specified conditions are met. Select the **Process Zoom Meeting** subflow.
Input	Input for the webhook registry. Select the following fields from the list: ○ Account ID ○ Event ○ Event TS ○ Object
Trigger Object	Zoom object that is used to trigger the subflow. Select **Meeting** from the list.
Name	Name of the webhook registry.

For more details on configuring the webhook, see Set up a bi-directional webhook for Zoom spoke.

Result

When these steps have been completed, you can generate the meeting summary for touchpoint meetings that have been created using Zoom.

Generate summary for Zoom meetings

Generate the meeting summary for virtual meetings conducted using Zoom.

Before you begin

Role required: sn_acct_lc.customer_success_application_admin

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.
2. Navigate to **Customer Success** > **All Touchpoints**.
3. Open the touchpoint for which you want to create a virtual meeting.
4. Follow the steps described in the Meetings section to schedule a Zoom meeting.
   The meeting summary can be generated only if the meeting State is set to **Scheduled**.
5. When the meeting starts, select **AI Companion** to start creating the meeting summary.
   The meeting summary is captured and saved in the Virtual Meeting Details table.

   Note:

   - A meeting summary is generated for each scheduled meeting.
   - - If a meeting occurs between the scheduled start and end date, the summary is captured separately for that meeting.
     - If a meeting occurs outside the scheduled date and time window, the meeting details are captured in the parent record.
   - For recurring meetings, the summaries for all occurrences are grouped under the parent record.
   - The Virtual Meeting Details record contains each child meeting summary.

6. To view the summary, navigate to **All** > **Touchpoints** > **Meetings** > **All**.
7. Select the **Number** link to open the Meeting Details page and navigate to the Meeting Summary related list.

   Note: If you select a parent record, you see a list of meeting summaries of all the child records.

8. Select the **Meeting actual start date** link.

The meeting summary is displayed in the Virtual Meeting Details page. If the Now Assist for Telecommunications, Media and Technology (TMT) plugin has been installed, the following fields are populated in the meeting record:

- Sentiment
- Internal notes
- External notes

View related items

The Related Items component provides access to related lists associated with engagements, touchpoints, customer plays, 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, customer plays, and documents are displayed on the engagement, touchpoint, customer play, and internal play pages.

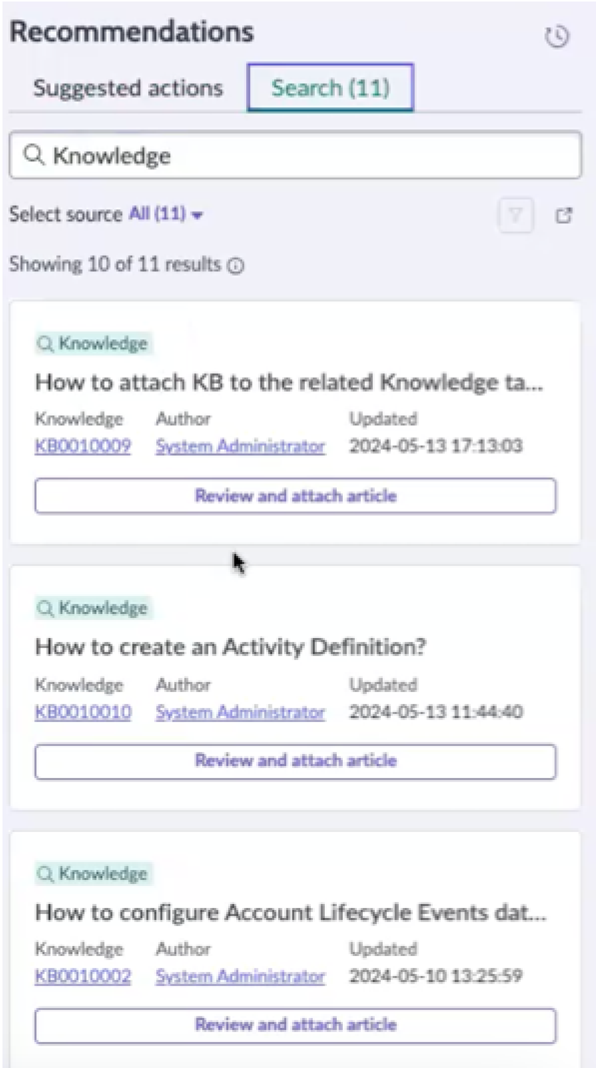
Note: The *`Documents`* related items is displayed only if you have installed the `com.snc.platform_document_management` plugin.

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.

Customer Success Management reference

Reference topics provide additional information about Customer Success Management application.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

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

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.

Overview of Customer Success Management

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, onboarding tasks, and data 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]
- Data import task [sn_ti_core_imp_task]
- Onboarding 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]
- Customer play [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
- Risk Signal and Issue (sn_acct_lc_risk_signal_issue)
- Implementation Record (sn_acct_lc_implementation_record)
- Risk Solution (sn_acct_lc_risk_signal_solution_relationship)
- Engagement Health Definition (sn_acct_lc_eng_hlt_def)
- Health Metric Configuration (sn_acct_lc_eng_hlt_mtr_config)
- Engagement Risk Definition (sn_acct_lc_eng_risk_def)
- Risk Threshold Override (sn_acct_lc_risk_threshold_override)
- Risk Occurrence (sn_acct_lc_risk_occurrence)
- Data Source (sn_data_ctx_engine_src)
- Context Engine Mapper (sn_data_ctx_engine_map)
- Context (sn_data_ctx_engine_ctx)
- Context Engine Data (sn_data_ctx_engine_data)
- Segment (sn_data_ctx_engine_brkdwn_seg)
- Segment Configuration (sn_data_ctx_engine_seg_conf)
- DCE Insight (sn_data_ctx_engine_insight)
- DCE Insight Item (sn_data_ctx_engine_insight_item)
- DCE Visualization (sn_data_ctx_engine_visualization)
- DCE Visualization M2M (sn_data_ctx_engine_visualization_m2m)
- Product Capability (sn_prod_cap_core_prod_cap)
- Product Capability Map (sn_prod_cap_core_prod_cap_map)
- Capability Relationship Map (sn_prod_cap_core_cap_rel_map)
- Product Usage (sn_prod_cap_core_prod_usage)
- Product Capability Usage (sn_prod_cap_core_prod_cap_usage)

Related topics

Domain separation for service providers

Customer Success Management roles

Roles added with Customer Success Management.

Customer Success Management roles

Role title	Description	Contains roles	User persona
sn_ti_core.delete	Role for delete access on records of Technology case table and Customer Success Choice.		
sn_ti_core.admin	Admin access on records of Technology case table and Customer Success Choice.		
sn_acct_lc.customer_success_viewer	The success viewer role provides authorized users the ability to view engagements, objectives, outcomes, initiatives, internal plays, customer plays, touchpoints, and any related tasks within customer success.		
sn_acct_lc.customer_success_agent	Enables read, create, and update access to engagements, objectives, outcomes, initiatives, internal plays, customer plays, touchpoints, and any related tasks within customer success.		Customer Success Manager
sn_acct_lc.success_play_admin	Enables 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.customer_success_customer	Customer role to interact with customer success team members from the provider organization.		

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
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	
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 Customer Play (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	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
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 Customer Success Definition (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	
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	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
sn_acct_lc_engagement	Delete	Provides delete access to sn_acct_lc.engagement_delete role	
sn_acct_lc_success_obj	Read/Report View	Provides read and report view access to sn_acct_lc.success_objective_read role	
sn_acct_lc_success_obj	Create/Write	Provides create and write access to sn_acct_lc.success_objective_write role	
sn_acct_lc_success_obj	Delete	Provides delete access to sn_acct_lc.success_objective_delete role	
sn_acct_lc_success_out	Read/Report View	Provides read and report view access to sn_acct_lc.success_outcome_read role	
sn_acct_lc_success_out	Create/Write	Provides create and write access to sn_acct_lc.success_outcome_write role	
sn_acct_lc_success_out	Delete	Provides delete access to sn_acct_lc.success_outcome_delete role	
sn_acct_lc_success_init	Read/Report View	Provides read and report view access to sn_acct_lc.success_initiative_read role	
sn_acct_lc_success_init	Create/Write	Provides create and write access to sn_acct_lc.success_initiative_write role	
sn_acct_lc_success_init	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	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
		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	
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	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
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	
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	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
		sn_acct_lc.engagement_contract_relationship_read role	
sn_acct_lc_engagement_contract_relationship	Create/Write	Provides create and write access to sn_acct_lc.engagement_contract_relationship_write role	
sn_acct_lc_engagement_contract_relationship	Delete	Provides delete access to sn_acct_lc.engagement_contract_relationship_delete 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	Enable 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	Enable 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	Enable report_view access on records in sn_acct_lc_data_validation_assist,	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
		for users with role sn_acct_lc.data_validation_assist_read	
sn_acct_lc_data_validation_assist	delete	Enable 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	Enable 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	Enable 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	Enable 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	Enable 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	Enable 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	Enable 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	Enable read for days_remaining in sn_ti_core_task, for users with roles (sn_ti_core.read, sn_customerservice.customer).	

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
sn_ti_core_task.progress	read	Enable 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	Enable read for company in sn_ti_core_task, for users with roles (sn_customerservice.customer, sn_ti_core.read).	
sn_ti_core_task.priority	read	Enable read for priority in sn_ti_core_task, for users with roles (sn_customerservice.customer, sn_ti_core.read).	
import_builder	create	Enable create access on records in import_builder, for users with role import_builder_create.	
import_builder	write	Enable write access on records in import_builder, for users with role import_builder_write.	
import_builder	read	Enable read access on records in import_builder, for users with role import_builder_read.	
sn_acct_lc.agent	Responsible for the end-to-end workflow from onboarding customer until account go-live.	• sn_acct_lc.customer_success_viewer • sn_acct_lc.risk_signal_issue_write • sn_acct_lc.risk_signal_solution_write • sn_acct_lc.squad_member_write	Onboarding Manager
admin	Responsible for configuring playbook, case type, emails, transform maps, and other necessary components.		ServiceNow admin/ developer
sn_customerservice.customer_admin	Primary customer contact responsible		Onboarding point of contact (customer)

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
	for managing the customer team involved in the onboarding process.		
sn_customerservice.customer_manager	Responsible for the managing customer's ServiceNow instance and setting up the Service Exchange application.		ServiceNow admin/ developer (customer)
sn_customerservice.customer	Responsible for providing necessary information like contact information, and locations. Verifies that the data meets the format required by the provider organization.		Foundational Data SME (Subject matter expert)
sn_acct_lc.success_manager	A Success Manager (CSM) oversees a team of Customer Success Agents to verify that enterprise customers achieve their goals using the provider's products. They build strong relationships, monitor progress toward 'Success outcomes,' and align customer objectives with actionable strategies to drive satisfaction, retention, and growth.		Director of Customer Success
sn_meeting_mgmt.meeting_creator	Granular role used to create and manage touchpoint meetings.		
sn_acct_lc.customer_success_application_admin	Granular role used to read, create, and update access to engagements, objectives, outcomes, initiatives, internal plays, customer plays, touchpoints, and any related tasks within customer success.		

Customer Success Management roles (continued)

Role title	Description	Contains roles	User persona
sn_data_ctx_engine.sn_data_ctx_engine_admin	Granular role used to read and write to the data context engine.		
sn_prod_cap_core.sn_prod_cap_core_admin	Granular role used for product capability.		
sn_prod_cap_core.usage_admin	Granular role used for product capability.		

Customer success management responsibilities

Responsibilities added with Customer Success Management.

Responsibilities	Description
Relationship Manager	Maintains ongoing strategic engagement with the customer. Verifies value delivery, stakeholder alignment, and long-term satisfaction.
Escalation Manager	Coordinates resolution of high-risk issues or service disruptions. Verifies visibility and timely resolution during escalations.
Service Delivery Manager	Oversees consistent service delivery. Tracks service quality, SLA performance, and manages ongoing coordination across teams.
Implementation Specialist	Oversees the execution of scoped ServiceNow implementations. Confirms that configurations meet customer needs and timelines.
Product Specialist	Expert in specific ServiceNow products or modules. Provides configuration guidance and adoption best practices tailored to product capabilities.
Customer Enablement Specialist	Guides customers through onboarding and enablement initiatives. Confirms that end users are trained and equipped to adopt the product effectively.
Solution Consultant	Translates business requirements into scalable ServiceNow solutions. Collaborates during pre-sales, implementation, and expansion phases.
Platform Architect	Designs the target ServiceNow architecture. Verifies that platform setup is scalable, secure, and aligned with long-term business needs.
Process Owner	Accountable for specific business processes (for example, Incident, Change). Defines KPIs,

Responsibilities	Description
	drives improvements, and confirms process maturity.
Customer Executive	Strategic decision-maker on the customer side. Aligns the customer's business goals with the ServiceNow adoption strategy.
Customer Information Officer (CIO)	Executive-level sponsor accountable for aligning ServiceNow initiatives with the customer's broader IT and digital strategy.

Customer success management tables

This section includes the Customer Success Management 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.
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.
Customer play	Customer plays 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 customer play (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 Customer Success definition record is used to specify categories that can be used to launch success play workflows that can create records and trigger playbooks automatically.

Table	Description
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.
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.

Customer success management business rules

This section includes the Customer Success Management 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 that closure information is populated and object is marked inactive before marking it as closed or canceled.

Business rule	Table	Description
Engagement is reopened	Engagement	Ensures that 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, customer plays, 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 that 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 that closure information is populated and object is marked inactive before marking closed/canceled.
Success objective is reopened	Success objective	Ensures that 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 isn't before planned start date.
Domain - Set Domain	Success outcome	Sets the domain information.
Required fields for outcome	Success outcome	Validates required fields.
Validate closure for outcome	Success outcome	Ensures that closure information is populated and object is marked inactive before marking it as closed or canceled.
Success outcome is reopened	Success outcome	Ensures that 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 isn't 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.

Business rule	Table	Description
Validate closure for initiative	Success initiative	Ensures that closure information is populated and object is marked inactive before marking it as closed or canceled.
Success initiative is reopened	Success initiative	Ensures that 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 customer play	Customer play	Validates required fields.
Validate closure for customer play	Customer play	Ensures that closure information is populated and object is marked inactive before marking it as closed or canceled.
Customer play is reopened	Customer play	Ensures that closure information is removed and object is marked active before reopening.
Validate engagement update	Customer play	This prevents the engagement field from changing on the 'Customer Play' record if the 'Customer Play' has success tasks associated with it.
Required fields for touchpoint	Touchpoint	Validates required fields.
Validate closure for touchpoint	Touchpoint	Ensures that closure information is populated and object is marked inactive before marking it as closed or canceled.
Touchpoint is reopened	Touchpoint	Ensures that closure information is removed and object is marked active before reopening.
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 that closure information is populated and object is marked inactive before marking it as closed or canceled.
Success task is reopened	Success task	Ensures that 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.

Business rule	Table	Description
Required fields for internal play	Internal play	Validates required fields.
Internal play is closed or canceled	Internal play	Ensures that closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play	Internal play	Ensures that closure information is removed and object is marked active before reopening.
Parent for internal play must be empty	Internal play	Ensures that 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 that closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play task	Internal play task	Ensures that 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 that closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen risk signal	Risk signal and issue	Ensures that closure information is removed and object is marked active before reopening
Avoid duplicate definition record	Definition record	Ensures that no two records share the same title and category.
Domain - Set Domain	Definition record	Sets the domain information.
Set active flag	Definition record	Sets status to active if published, or 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.

Business rule	Table	Description
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 that 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 must 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 shouldn't 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 shouldn't come after next run date.
Unique source to context	Context Engine Mapper	Ensure there's a 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 according to source	Context	Context record's mappers should be unique.
Abort if duplicate record found	Engagement Risk Definition	Aborts if similar record 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 exists
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

Business rule	Table	Description
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 that each health definition is unique
Validate sum of health def config weight	Engagement Health Definition	Checks all health definition metric configuration for health definition sums to 100
Abort creation for published health def	Health Metric Configuration	User shouldn't 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 shouldn't 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 exists
Avoid duplicate sold product	Applicable Sold Product	Aborts if similar record exists
Avoid duplicate customer team	Applicable Customer Team	Aborts if similar record exists
Avoid duplicate account team	Applicable Account Team	Aborts if similar record exists
Create Activity	Create activity for Applicable Account Team [sn_acct_lc_eng_m2m_team_mem]	Create record in activity table on insert update delete
Create Activity	Create activity for label [sn_meeting_mgmt_meeting_details]	Create record in activity table on update
Create Activity	Create activity for Risk Signal and Issue [sn_acct_lc_risk_signal_issue]	Create record in activity table on insert update
Create Activity	Create activity for Escalation [sn_customerservice_escalation]	Create record in activity table on insert update
Create Activity	Create activity for Success Initiative [sn_acct_lc_success_initiative]	Create record in activity table on update
Create Activity	Create activity for Success Task [sn_acct_lc_success_task]	Create record in activity table on update

Business rule	Table	Description
Create Activity	Create activity for Touchpoint [sn_acct_lc_touchpoint]	Create record in activity table on insert update
Create Activity	Create activity for Applicable Customer Team [sn_acct_lc_eng_m2m_cntct_rel]	Create record in activity table on insert update delete
Create Activity for contract	Create activity for Contract [ast_contract]	Create record in activity table on update
Create Activity for Engagement	Create activity for Engagement [sn_acct_lc_engagement]	Create record in activity table on update
Create Activity for Success Outcome	Create activity for Success Outcome [sn_acct_lc_success_outcome]	Create record in activity table on update
Sync Progress To State	Sync Progress To State for Implementation Record [sn_acct_lc_implementation_record]	Create or update record in the implementation record table with state or progress fields changing.
Duplicate name in product capability	Product Capability [sn_prod_cap_core_prod_cap]	Duplicate name check-in Product capability
Prevent Duplicate Product Capability Map	Product Capability Map [sn_prod_cap_core_prod_cap_map]	Duplicate check in Product capability map table
Product capability usage validations	Product Capability Usage [sn_prod_cap_core_prod_cap_usage]	Validations for capability usage table
Product usage validations	Product Usage [sn_prod_cap_core_prod_usage]	Validations for product usage table
Set Prod Capability Map Active	Product Capability Map [sn_prod_cap_core_prod_cap_map]	Set on state change to mark active = true if state is published, else false.
Set calc metric value in target table	Context Engine Data [sn_data_ctx_engine_data]	Whenever an entry is added or updated in the Context Engine Data table for a calculated data source, and if that data source has a target table and target field defined, the corresponding rows in the target table - where the target query field matches the context record - will have the data context engine value set in the target field.
Abort adding future data	Context Engine Data [sn_data_ctx_engine_data]	Aborts if the record added to Data Context Engine has a start or end date after current time
Validate circular reference	Segment [sn_data_ctx_engine_bkdwn_seg]	Aborts the publish operation and reverts the segment to draft if it introduces a

Business rule	Table	Description
		circular reference: That is, if the segment configuration includes a data source that already depends on the current data source associated with the segment. This circular reference check is necessary to ensure that all data sources maintain a valid execution order.
Validate context on publish	Data Source [sn_data_ctx_engine_src]	Validates all contexts are active and have active mappers on publish. In case of calculated metrics, validate if at least 1 active context exists with same table as breakdown table.
Unique source to context	Context Engine Mapper [sn_data_ctx_engine_map]	For global mappers: Ensure only one mapper exists for each combination of a given source and resolving context table. For metric-based mappers: Ensure that the same metric or data source does not appear in multiple mappers for the same source and resolving context table pair.
Validate breakdown segments on publish	Data Source [sn_data_ctx_engine_src]	On publishing calculated data source, ensure that at least one segment is present and all segments are published
Validate sum of seg config weight	Segment [sn_data_ctx_engine_bdwn_seg]	On publishing segment, ensure that weight of all segment configurations add to 100
Avoid duplicate breakdown segment	Segment [sn_data_ctx_engine_bdwn_seg]	Ensure duplicate segment for the same data source isn't present for the same name, rank, or conditions
Abort if visualization validation fails	DCE Visualization [sn_data_ctx_engine_visualization]	Abort if another visualization record exists with the same data source, resolving context and conditions
Unique context according to source	Context [sn_data_ctx_engine_ctx]	Abort if another context with the same table exists for the given data source
Unique set of metrics according to breakdown seg	Segment Configuration [sn_data_ctx_engine_seg_conf]	Abort if another segment configuration exists for the given segment with the same data source
Abort ctx creation for non draft src	Context [sn_data_ctx_engine_ctx]	Enable creating context for data source in draft state only
Abort seg conf creation if non draft seg	Segment Configuration [sn_data_ctx_engine_seg_conf]	Enable creating segment configuration for segment in draft state only
Abort creating seg for non draft source	Segment [sn_data_ctx_engine_bdwn_seg]	Enable creating segment for data source in draft state only
Move data source to draft	Segment [sn_data_ctx_engine_bdwn_seg]	As soon as a segment is moved to draft, if its data source isn't draft, move it to draft as well

Business rule	Table	Description
Abort if invalid Visualization M2M	DCE Visualization M2M [sn_data_ctx_engine_visualization_m2m]	Validates given visualization_m2m item record
Abort if insight item validation fails	DCE Insight Item [sn_data_ctx_engine_insight_item]	Validates given insight item record
Abort if insight validation fails	DCE Insight [sn_data_ctx_engine_insight]	Validates given insight record
Create Usage based on Appl Sold Prod	Applicable Sold Product [sn_acct_lc_eng_m2m_sp]	Trigger: A record is added or modified in the Applicable Sold Products table. Actions: Create Product Usage Record. If a Product Usage record doesn’t exist for the sold product, create it.Create Product Usage records for all child products (across all hierarchy levels).For each usage record, update the Total Child Product Count (reflecting only immediate children). Associate Capabilities:For each usage record:Check the Product Capability Map using the sold product's product model.If capability records exist, create corresponding Capability Usage records. Update the Total Capability Count. Don’t include related capabilities—only direct capabilities are considered.
Add Capability usage for new Cap Map	Product Capability Map [sn_prod_cap_core_prod_cap_map]	Trigger: A new active record is added to the Product Capability Map. Actions: Identify all sold products with a matching product model.For each matching product:Create Capability Usage records, update the Total Capabilities in Use count on the corresponding Product Usage record
Update usage on setting adoption score	Product Usage [sn_prod_cap_core_prod_usage]	Set Activation status of the given sold product and all its parent sold products in its hierarchy to 'In Use' and update Usage plan to 'Activated' if Usage plan isn’t set
Update usage on setting adoption score	Product Capability Usage [sn_prod_cap_core_prod_cap_usage]	Set Activation status of the given capability usage record, its sold product and all its parent sold products in its hierarchy to 'In Use' and update Usage plan to 'Activated' if Usage plan isn’t set
Update renewal finalized on	Update renewal finalized on field value on Contract	This helps to determine the won/loss of a contract and at what month of the year

Business rule	Table	Description
	table when Substate changes to Renewal Approved or Renewal Rejected. To capture the date when it is approved or rejected.	for Renewal Tab won/loss visualization graphical plot.

Customer success management flows

This section includes the Customer Success Management flows.

Flow	Description
Customer Success Management Execute Flow and Send Notification	Parent flow that triggers the customer's subflow and send a notification.
Customer Success Management 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.
Customer Success Management 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.
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.

Flow	Description
	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.
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 Management glossary

Learn about the terms and concepts that are unique to Customer Success Management.

A

Glossary terms are grouped alphabetically.

account onboarding

A pre-configured, PAD-driven (Process Automation Designer) workflow that guides the end-to-end data capture and setup of a new enterprise customer account.

C

Glossary terms are grouped alphabetically.

capability usage

Used to tracks whether a customer is actively receiving value from specific licensed product capabilities.

color banding table

A configuration table used to map numerical thresholds to visual indicators (Red, Yellow, Green) for health and risk scoring.

context engine data table

The destination table where the final values collected by the data context engine are stored. This data is used for visualization in workspace widgets.

context engine mapper

Used to define which fields on source tables act as breakdowns to link data to the correct account or engagement.

customer play

A type of success case used for external collaboration, allowing customers to view and participate in specific milestones.

D

Glossary terms are grouped alphabetically.

data context engine (DCE)

A framework used to collect and associate data from various internal and external sources with specific contexts (like a customer account or engagement) to track health score, success outcomes, and performance.

data source

A configuration record that specifies the source table, aggregation method, and filters to be used to retrieve data for analysis by the data context engine.

data validation assist table

A staging table used during the onboarding process to clean and validate customer data before it is saved.

E

Glossary terms are grouped alphabetically.

engagement

A central record used to manage and track a specific phase of the customer journey (such as onboarding or renewal). It serves as the primary link between the customer's success plan, their current health score, and the specific products being tracked during that time period.

I

Glossary terms are grouped alphabetically.

internal play

A success case type used for private account strategy and planning that is not visible to the customer.

P

Glossary terms are grouped alphabetically.

product capability

A record that defines a specific functional business value or service provided by a product. It serves as the main definition used to measure whether a customer is successfully adopting the key components of the products they have purchased.

R

Glossary terms are grouped alphabetically.

risk signal

An automated alert generated when negative data trends, such as low product usage or missed milestones are detected.

S

Glossary terms are grouped alphabetically.

success blueprint

A reusable template containing a predefined set of success Objectives and initiatives designed for specific customer requirements.

success initiative

A strategic project or action plan created to help customers achieve a specific success objective.

success objective

A record that defines a specific, measurable business goal or milestone a customer intends to achieve, for example, reduce operational costs by 20%.

success outcome

A record that documents the specific, realized value delivered to a customer. It links a success objective to actual performance data, using metrics to prove that the customer's desired business result has been achieved.

success play

A repeatable set of activities designed to address a specific customer requirement. When a success play is initiated, a success case based on an internal or customer play is created.

success task

The most granular unit of work assigned to a customer success agent to complete a success initiative.

T

Glossary terms are grouped alphabetically.

touchpoint

A logged interaction with a customer (meeting, call, email). Touchpoints can be automated, AI#generated, or manually created.