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MeriTalk

servicenow federal summit

March 4, 2019 • 8:00 am – 5:00 pm
Marriott Marquis • Washington, D.C.

Digital Transformation

The foundation for consumer-like services



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CSM for CMS

ServiceNow and Ventech

Ventech
Solutions





Agenda

Introductions

Customer Service Management Overview

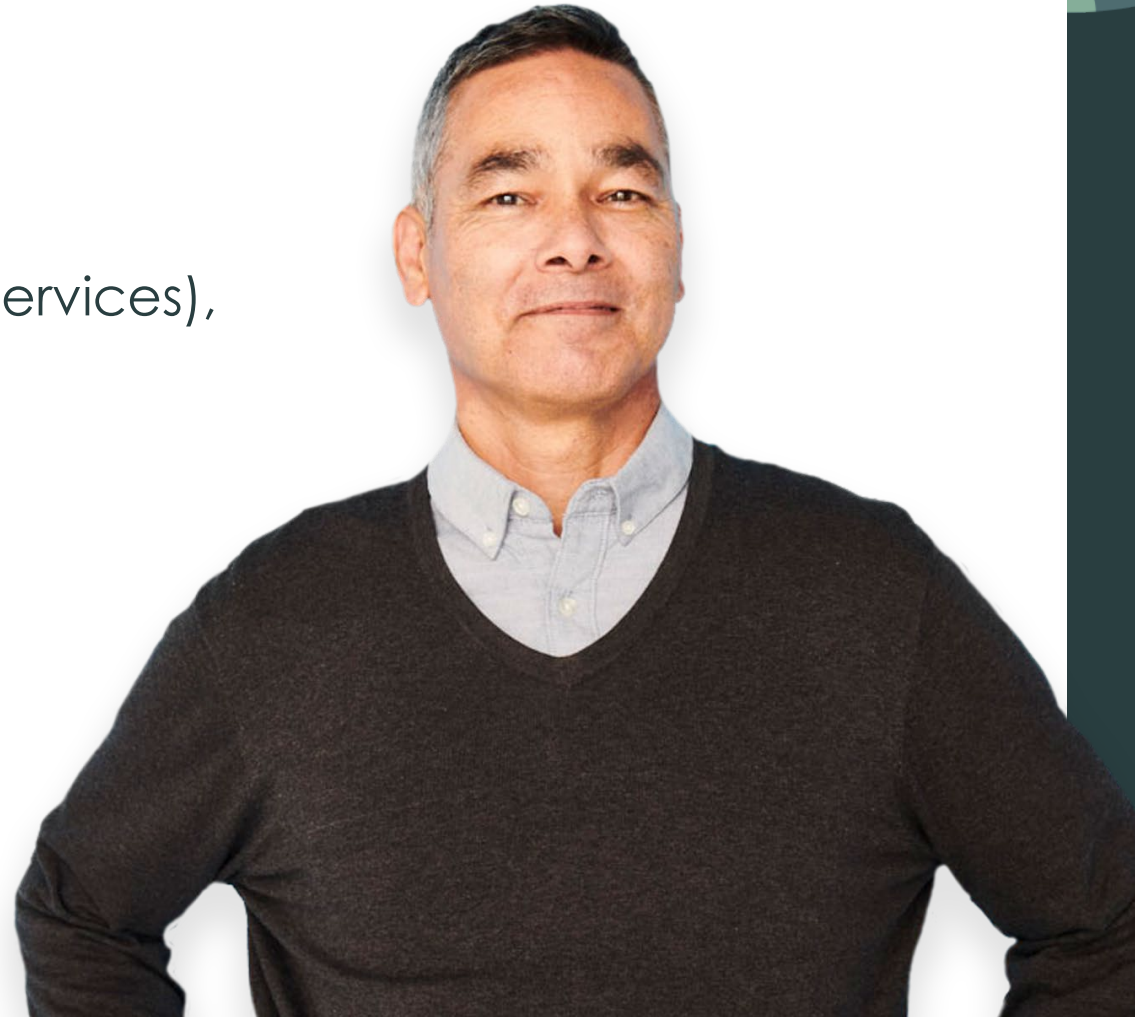
Customer—CMS (Centers for Medicare/Medicaid Services),
CCSQ (Center for Clinical Standards and Quality)

- Challenges
- Solutions
- Benefits

Ventech Implementation of ServiceNow for CMS

Introduction of New Features in Madrid

Q&A



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Delight customers with proactive service from issue to resolution

Customer workflows



Top customer frustrations fueled by 3 problems

Disconnected experiences result in poor customer satisfaction and high costs

Departmental silos
hinder resolution

19%

contacted customer
service **7 or more times**
to address their
request

Customer needs
not addressed

ONLY
17%

satisfied with the action
taken to resolve
their most serious
problems

Customers can't
help themselves

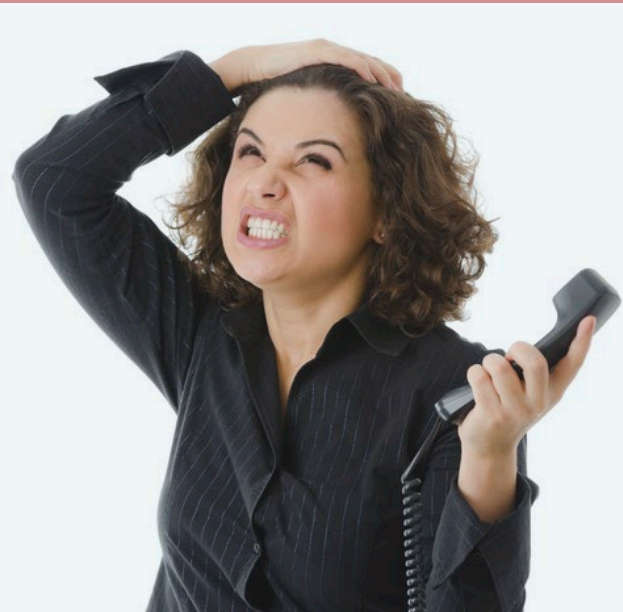
40%

prefer digital customer
service versus a phone
call with an agent

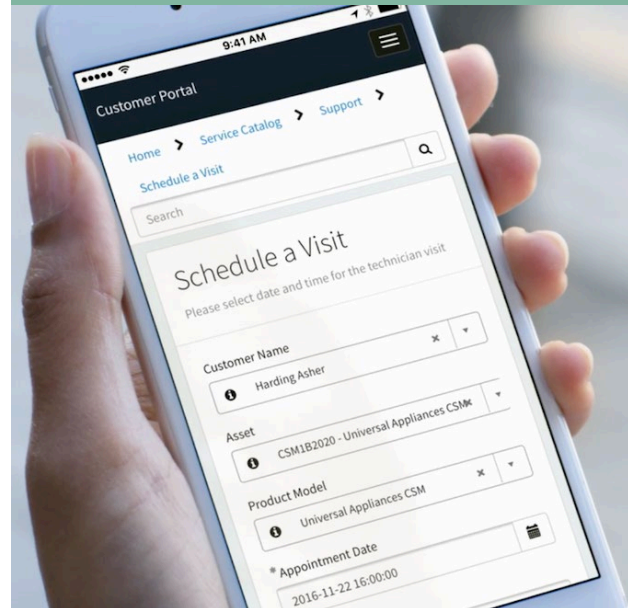
There is a better way

Delight customers with proactive service from issue to resolution

The Old Way



A Better Way with ServiceNow



Resolve complex issues end-to-end

Intelligently fix problems before customers know they have them

Drive action to instantly take care of common requests

Customer Service Management overview of capabilities



Omni Channel Engagement



Customer Data Management



Knowledge and Communities



Case Management



Field Service Management

Service Management Differentiation

Incident • Catalog • Request • Problem • Change • Configuration

User Experience



Service Portal



Service Catalog



Mobile Native



Community



Agent Workspace

Service Intelligence



Supervised Machine Learning



Virtual Agent Designer



Virtual Agent



Actionable Analytics



Time-series Database

Service Experience



Integration Hub



Flow Designer



Visual Task Boards



Mobile Designer



Service Aware CMDB

Customer—CMS, CCSQ

CMS (Centers for Medicare/Medicaid Services)

CCSQ (Center for Clinical Standards and Quality)

Mission

As a trusted partner, they serve CMS, HHS, and the public to improve health outcomes, population health, and reduce health care costs through continuous improvement by leading clinical quality improvement, evidence gathering, and health systems transformation

Goals

Improve health outcomes, promote healthy populations, and lower cost through continuous improvement



Challenges—CMS, CCSQ

- Very complex environment
 - 80+ organizations
- Multiple instances of Remedy (highly customized)
- Cannot differentiate between internal and external users/customers (different needs)
- No historical record
- Difficult/impossible to escalate
- No self-serve
- High operating costs



Quality Payment Program (QPP)—CMS, CCSQ

- New program (Incentive program) inside CCSQ—2016
- Existing Remedy solution was not an option
 - New solution required
- First adopter of ServiceNow inside CCSQ
 - ITSM Incident—July 2016
 - Implemented—October 2016
- November 2016—The ServiceNow Customer Service Management (CSM) was purchased
- **First adopter of CSM inside the Federal Government**

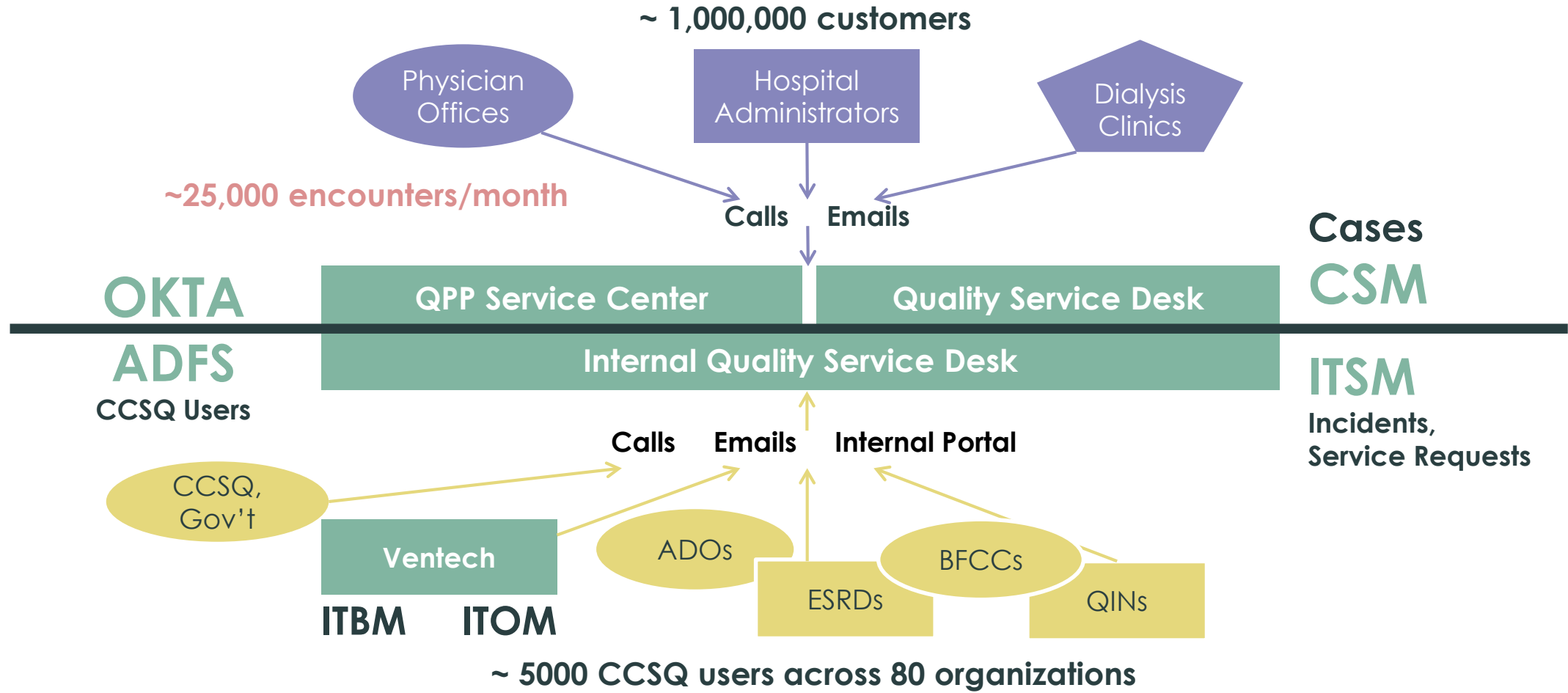


Enterprise needs—CMS, CCSQ

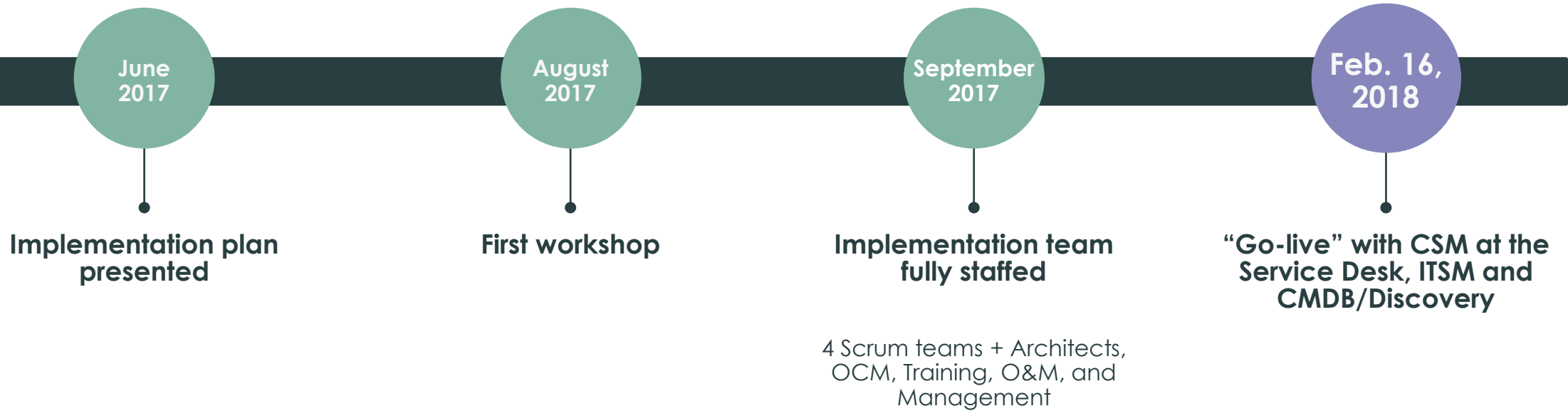
Enterprise: The rest of CCSQ (Healthcare Quality Information System, HCQIS)

- Replace outdated, insufficient existing system
 - At a minimum replace all functionality in Remedy
- Establish robust platform that allows for scalability and flexibility
- Keep customizations to a minimum (close to out of the box)
- Create self-serve capability
- Metrics based
- Support existing processes
- Do no harm to QPP

A picture is worth a 1,000 words



Enterprise timeline of implementation



February 18, 2018: Must be off current implementation of Remedy



One key to CCSQ's success

Minimal Viable Product

- Just enough to get off Remedy
- No “wish list” items
- Backlog item work down continues after go-live



Benefits with ServiceNow—CMS, CCSQ

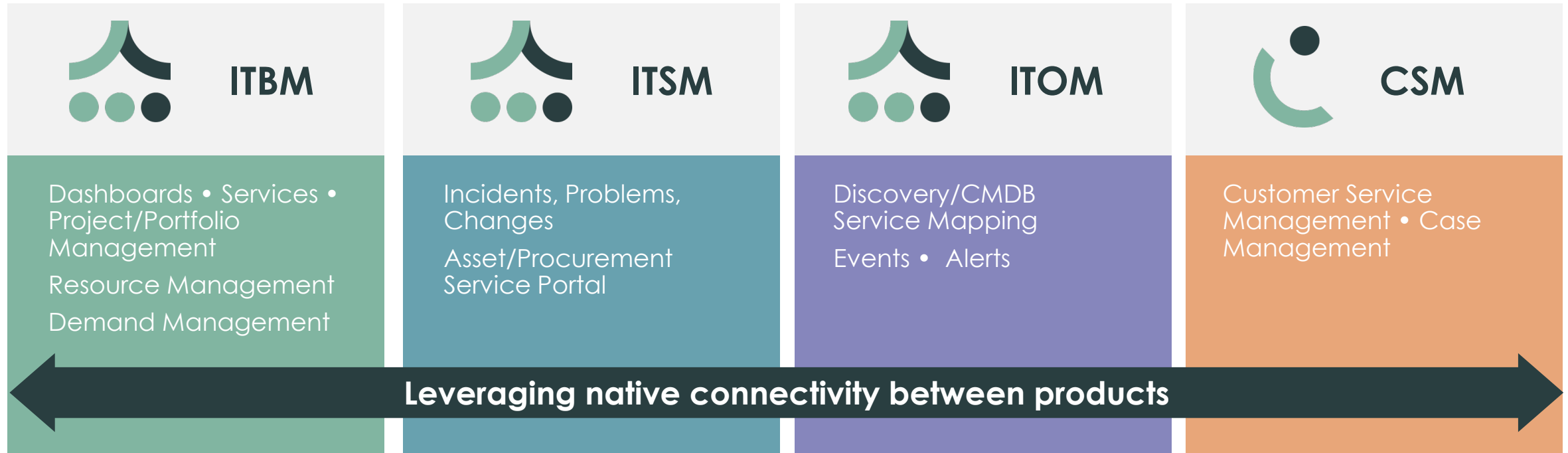
- Substantially improved performance metrics
 - **15 second** average speed to answer
 - **>90%** customer satisfaction
 - **>80%** first call resolution
- Scalable to integrate additional Help Desks and Service Centers
- Dynamically configurable to respond to call volume surge at the Service Desk for multiple programs
- Can support a wide variety of personas to personalize support



Solutions implemented to date—CMS, CCSQ

- **CSM: 5 major organizations and 4 Service Desks supported**
 - Over 1 million external customers
 - KM for the Agents
- **ITBM:** Ideation, Demand Management, Project Management, Portfolio Management, SDLC, Resource Management, Managed Docs
- **ITSM:** Incident, Problem, Change, Service Request Catalog, Asset and Procurement, Service Portal, KM for the functional areas, Semi-Custom Apps
- **ITOM:** Discovery, Service Mapping, AD Password Reset—moving to wider Orchestration, Cloud, and Event Management
- **Performance Analytics across the board**

How ServiceNow products work together for CCSQ



Radical change rather than continuous improvement

Ventech's ServiceNow practice

May
2017

Built a rapidly growing
practice

- **Accomplishments:** Results-driven success—on-time delivery of significant ServiceNow deployments at CMS
- **More than 85 SN deployments** across the team

Today

45 people and growing

Center of Excellence
established for cross-
Ventech support and BD

- **More than 30 ServiceNow Certs** plus ITIL experts, PMPs, Certified Scrum masters, trainers, and testers
- **Bronze partner**





Ventech Solutions' role supporting CCSQ

Infrastructure support contractor

- **>400** personnel

Health Care Quality Information System (HCQIS)

- **80** organizations, including CCSQ oversight
- **5,000** internal users
- **>1 million** external customers

Ventech's challenges for a successful implementation of ServiceNow to CCSQ

In addition to the challenge of replacing Remedy and standing up a new program, there were additional challenges:

- Remedy hard stop—February 18, 2018
- Short implementation period
- Migrate QPP's user records to contact records
- Archive incidents created by QPP
- Reset Incident to OOTB
- Multiple custom Remedy forms
- **>300,000** encounters per year (Service Desk)

Overview of Ventech's highly successful implementation of ServiceNow to CCSQ

- **Ahead of schedule:** February 16—Go-live, On-budget
- Remedy turned to “read only” for archiving
- **Early adopter of CSM for the Quality Payment Program (QPP)—created a new Many-to-Many data model to support the healthcare community**
- **Conversion of remaining Service Desks to CSM from Remedy**
- **Currently CSM supports more than 1 million customers (165-person Service Desk)**
- **1,300 fulfillers (CSM and ITSM)**



CSM for Support of Critical Systems

CCSQ's unique business requirements needed a unique solution

- **CSM**—Supports multiple lines of business and service desks
- The CSM implementation for CCSQ is very complex and extraordinarily important
 - How many of you know someone who is on Medicare or Medicaid? Maybe a family member?
 - Providers who participate with Medicare/Medicaid participate in quality programs run by CCSQ
 - The interactions between the providers and CCSQ are captured in CSM



CSM, not a “One Trick Pony”

- **5 different major organizations** with different requirements
 - Similar enough to be data-driven vs. scoped app
- **30 smaller application and support organizations** who support providers of various types including:
 - Doctors
 - Hospitals
 - Clinics
 - Post-acute care facilities
- **Coming Soon: Service Portals for CSM**



CSM, better together with ITSM and ITBM

- What if the Case needs to be an Incident?
- How about a Service Request?
- What about an improvement suggestion?



Ventech Implementation Methodology: Building blocks

- **Trusted partner** with the customer and with ServiceNow
- Use the **ServiceNow Implementation Methodology (SIM)** as a foundation
- Project and Program Management
- Imbedded Organizational Change Management
- Imbedded ServiceNow trainers
- Post Go-live support tailored to the organization's needs
- Operations & Maintenance built-In
- **Over-communicate!**



Ventech Implementation Methodology: Project/Program Management

- **Superior Project/Program Management**
- How it happens
 - Plan, plan, plan
 - Adjust
 - Trust
- Multiple concurrent Development scrum teams
- Operations & Maintenance scrum team



Ventech Implementation Methodology: Organizational Change Management

- **Change is hard!** Working with OCM makes it easier
- Stakeholder ID
- Adoption campaign (top down and bottom up)
- Over-communicate with stakeholders and users



Ventech Implementation Methodology: Training

Embedded Certified ServiceNow Trainers from the word “go”

- Included in all implementation activities
- **140 “just-in-time” classes** (220 hours of instruction)

Indispensable part of the success in CCSQ

- They saw things from the customer/user view
- They found the little things that may have been missed

They were as important Post Go-live as they were Pre Go-live



Ventech Implementation Methodology: Post Go-live support

Go above and beyond

- On-premise war rooms set up at primary locations
- Admins roaming the SD floor providing hands on assistance
- WebEx rooms live for up to two weeks following Go-live



Ventech Implementation Methodology: O&M built in

One Scrum team (reinforced)

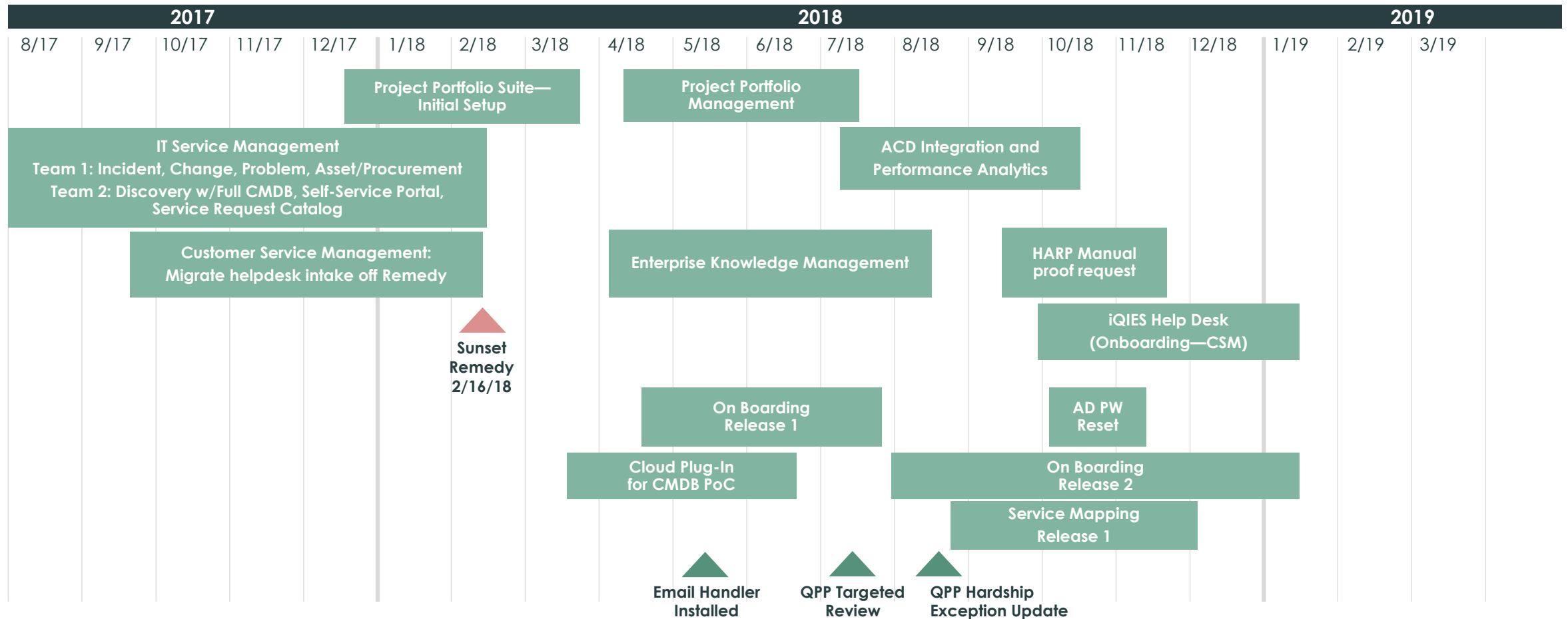
- Day-to-day Admin work
- SN Team Queue Management
- Backlog of minor enhancements
- Coordination with process owners and customer for prioritization

Ventech Implementation Methodology: Over-communicate!

Really? Is there such a thing?

- **What info do you have and who needs it?**
 - The entire team
 - Never sit on bad news
 - Resist the temptation to wait for a little more information
 - Set expectations with the customer and exceed them

A snapshot in time—What's been done

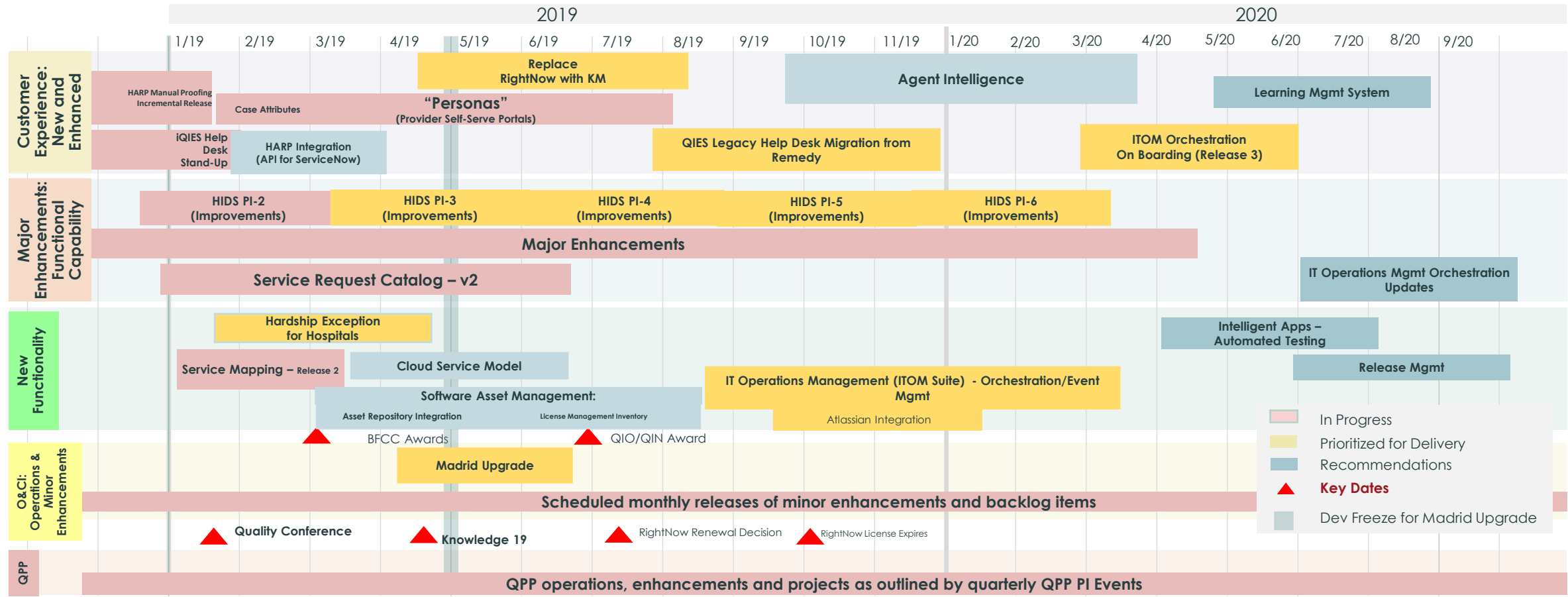




What's next for CCSQ?

- External Service Portals (for Providers)
- Software Asset Management (SAM)
- HARP Integration for Authentication (OKTA and Savynt)
- Expanded ITOM integration
- Madrid, once FEDRAMP'd
 - Agent Workspace
 - Agent Intelligence
 - SAFe Agile
 - Integrations Hub

A snapshot in time—The present and future



Better together—and getting better!

- CSM to support the external customers
- ITBM to run all infrastructure projects and ServiceNow projects
- ITOM to run the infrastructure
- Leverage native connectivity between ServiceNow products
- More to come



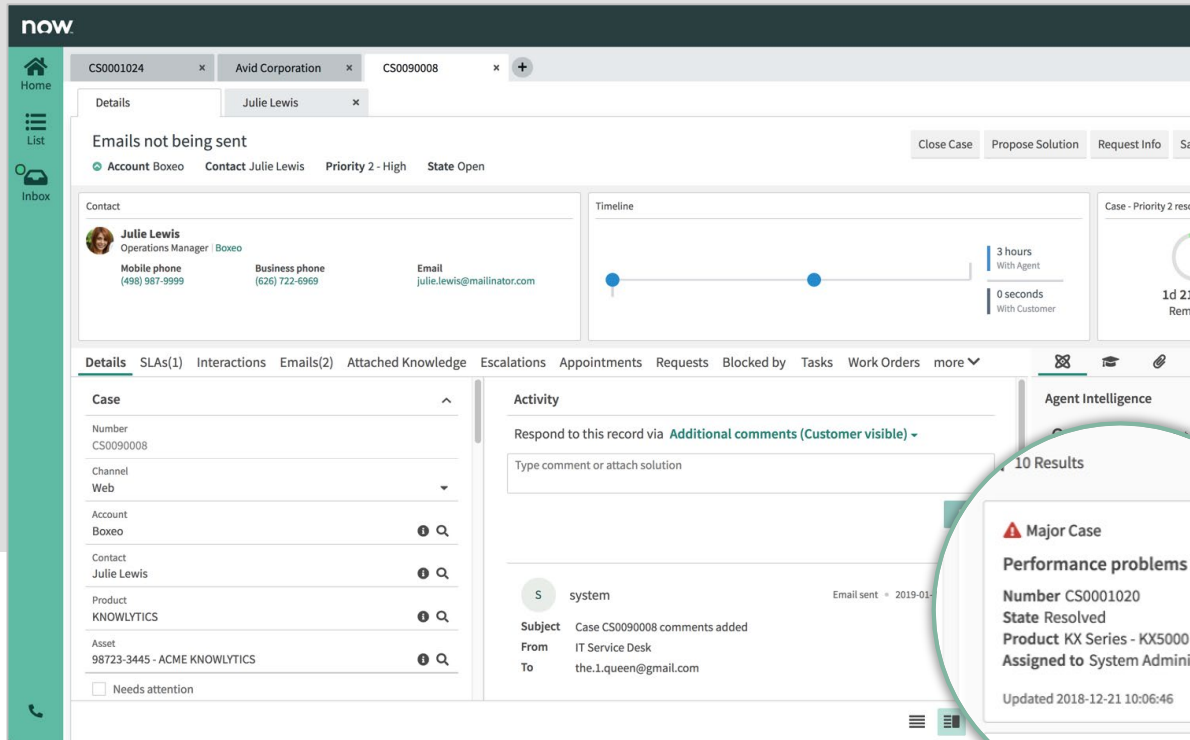
knows how to get it done!

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What's new in Madrid with Customer Service Management





CUSTOMER SERVICE MANAGEMENT

Agent Workspace

Improve agent and customer experience with optimized workspace layout

Multi-task efficiently with tabs and child tabs

Quickly view key customer details, timeline and service levels

Solve cases faster with machine learning* and contextual help

*Agent Assist uses machine learning capabilities in Agent Workspace, requires a subscription to CSM Professional.



The screenshot shows the ServiceNow interface. On the left, a sidebar contains navigation options: Home, List, and Inbox (with a notification badge). The main area displays a 'Status' dropdown menu with options: Available (selected), Case, Chat, and Away. Below the menu, a case card for 'Router upgrade question' is visible, with 'Accept' and 'Reject' buttons. The main table lists cases with columns for Case ID, Description, Action status, Contact, and Account.

Case ID	Description	Action status	Contact	Account
CS0001037	Need help with Monitoring Reports		Julie Lewis	Boxeo
CS0001035	Performance Issues with Acme Analytics	Needs attention	Julie Lewis	Boxeo
CS0001036	Router Heating up		Linda Cox	Avid Corporation
CS0001030	Trouble with router		Linda Cox	Avid Corporation
CS0000052	Router overheating after firmware upgrade		George Warren	Boxeo
CS0001025	ACME XTRA upgrade error		Crissy Stark	Unity System
CS0001023	How to do firmware upgrade on KX5000?		Ronald Hawes	Elegant Communications
CS0001022	Help with installation		Daniel Kraig	Diagonal Inc.

CUSTOMER SERVICE MANAGEMENT

Advanced Work Assignment

Automate omni-channel assignment to reduce complexity

Auto-assign based on availability, capacity, and skills

Push chats and cases to agents for faster response

Configure priorities and timers to meet response goals



Action status

- Needs attention
- Blocked by customer
- Blocked internally

Number	Short description	Consumer	Channel	State	Priority	Assigned to
CS0002010	Router crashed during		Web	Open	4 - Low	John Jason
CS0000727	Router firmware upgrad		Web	Awaiting Info	1 - Critical	John Jason
CS0000871	Acme Analytics perform		Web	Open	1 - Critical	John Jason
CS0000870	Router performance issue		Web	Open	2 - High	John Jason
CS0000725	Router with VoIP channels		Web	New	1 - Critical	John Jason
CS0000701	Router Recovery		Web	New	2 - High	John Jason
CS0000001	Issue with router		Web	Resolved	1 - Critical	John Jason

CUSTOMER SERVICE MANAGEMENT

Case Management enhancements

Help agents deliver a better customer experience

Streamline customer lookup and verification steps

Quickly see which cases need attention

Respond faster with related case recommendations

Needs attention

Opened
2018-09-18 09:21:16

Verify Contact

Look up
George Warren

George Warren

Account: Boxeo
Mobile phone: +1 858 867 7857
State / Province: CA

Email: geo.warren@mailinator.com
Street: 428 19th Street
Zip / Postal code: 92102

Agent Intelligence

Router keeps dropping connection

1 Result (Filtered)

Case

Router performance issue after so...

Number CS0000870
Product KX Series - KX5000
Assigned to John Jason



The screenshot displays the ServiceNow Knowledge Management interface. A circular callout highlights the configuration fields for an article:

- Category: ACME Analytics Software Suite
- Ownership Group: Acme Analytics Experts
- Valid to: 2020-01-01
- Version: 6.02
- Article type: HTML
- Workflow: Review
- Source Task: (empty)
- Attachment link:
- Display attachments:

Below the configuration fields, there is a table for Approvals:

State	Approver	Comments	Approval for	Created
Requested	Emily Jason		(empty)	2018-09-18 11:58:39
Requested	Beth Anglin		(empty)	2018-09-18 11:58:39
Requested	Bernard Laboy		(empty)	2018-09-18 11:58:39

CUSTOMER SERVICE MANAGEMENT • KNOWLEDGE MANAGEMENT

Group Ownership

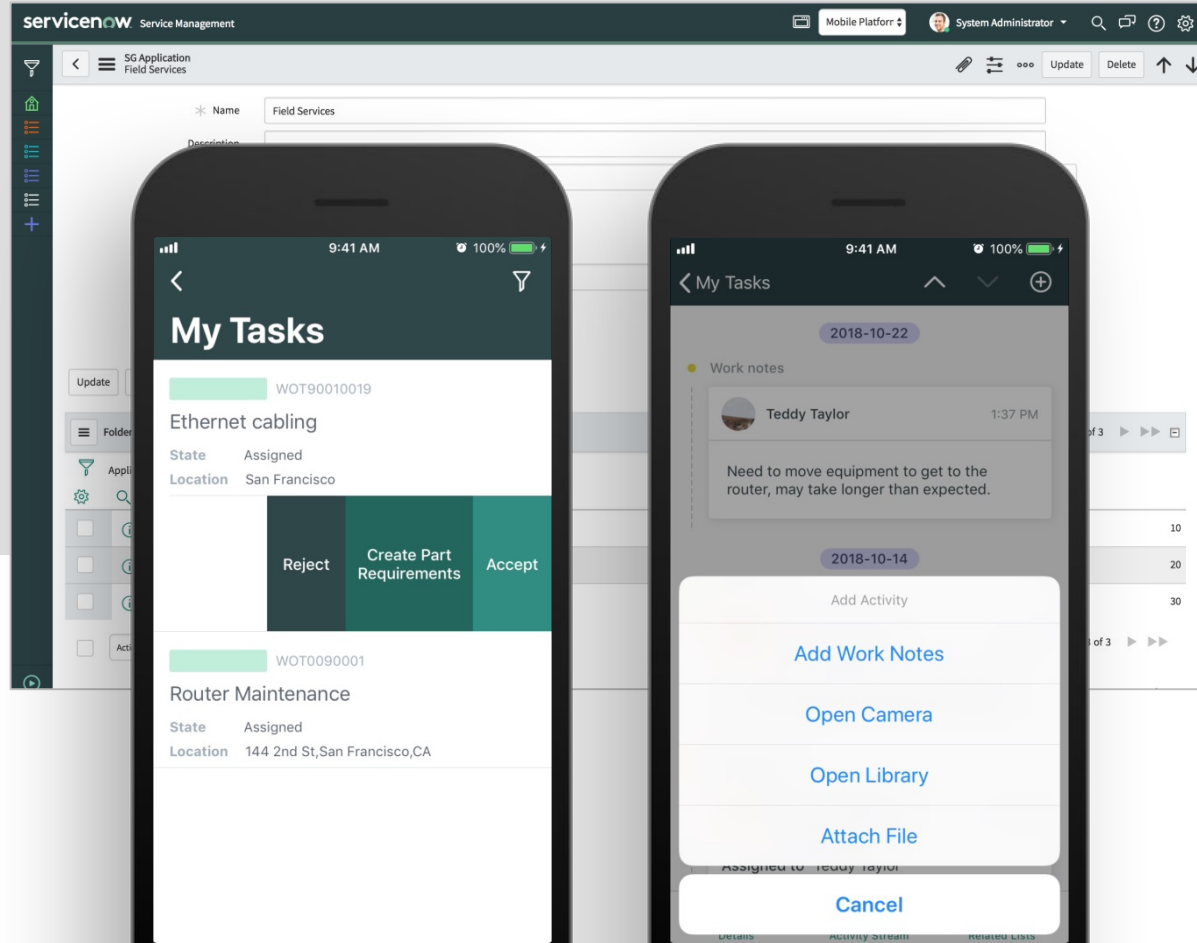
Improve article quality and response time with team content management

Configure ownership groups to support knowledge teams

Assign articles to groups to ensure timely response

Control feedback management and publishing workflow





CUSTOMER SERVICE MANAGEMENT • FIELD SERVICE MANAGEMENT

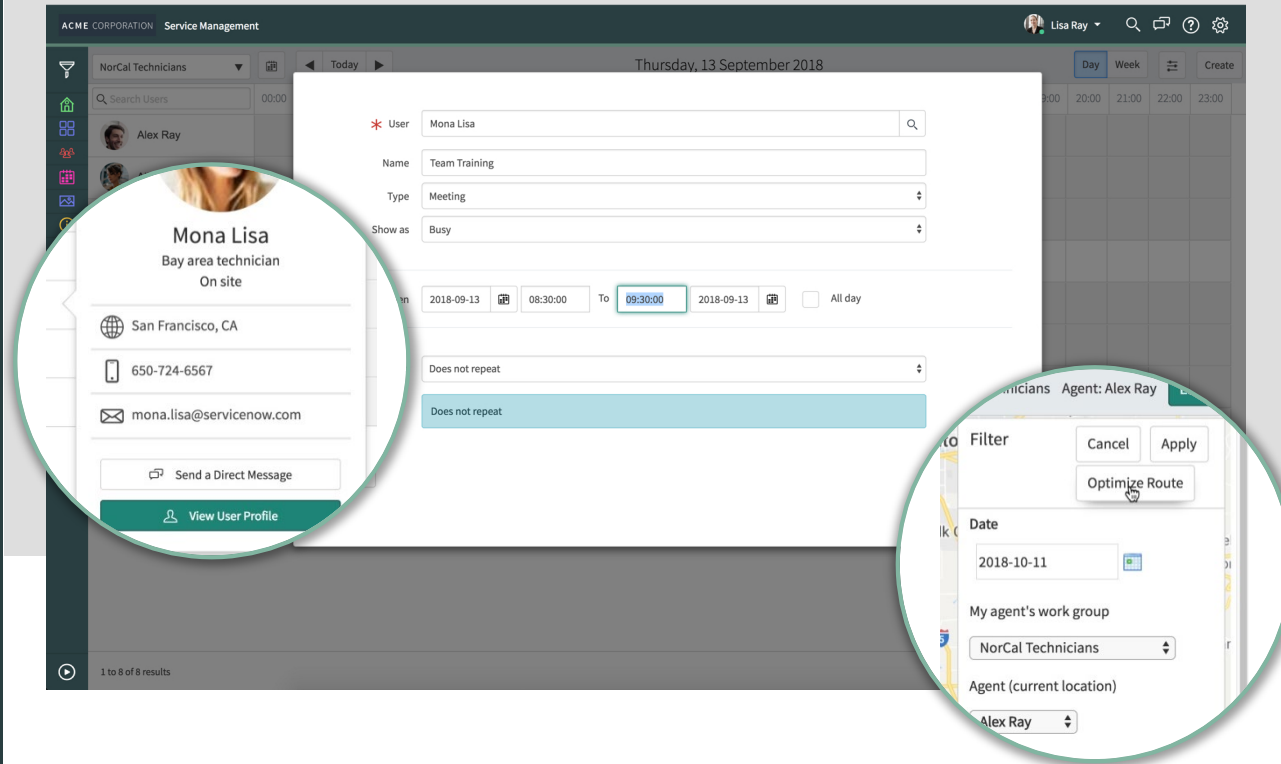
New Mobile with offline capabilities

Boost technical productivity

Provide faster and easier mobile experience

Integrate maps, geo-location tracking, and swipe actions

Enable offline read/write when disconnected



CUSTOMER SERVICE MANAGEMENT • FIELD SERVICE MANAGEMENT

New Mobile with offline capabilities

Boost technical productivity

Provide faster and easier mobile experience

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Enable offline read/write when disconnected

Questions?



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Thank you

