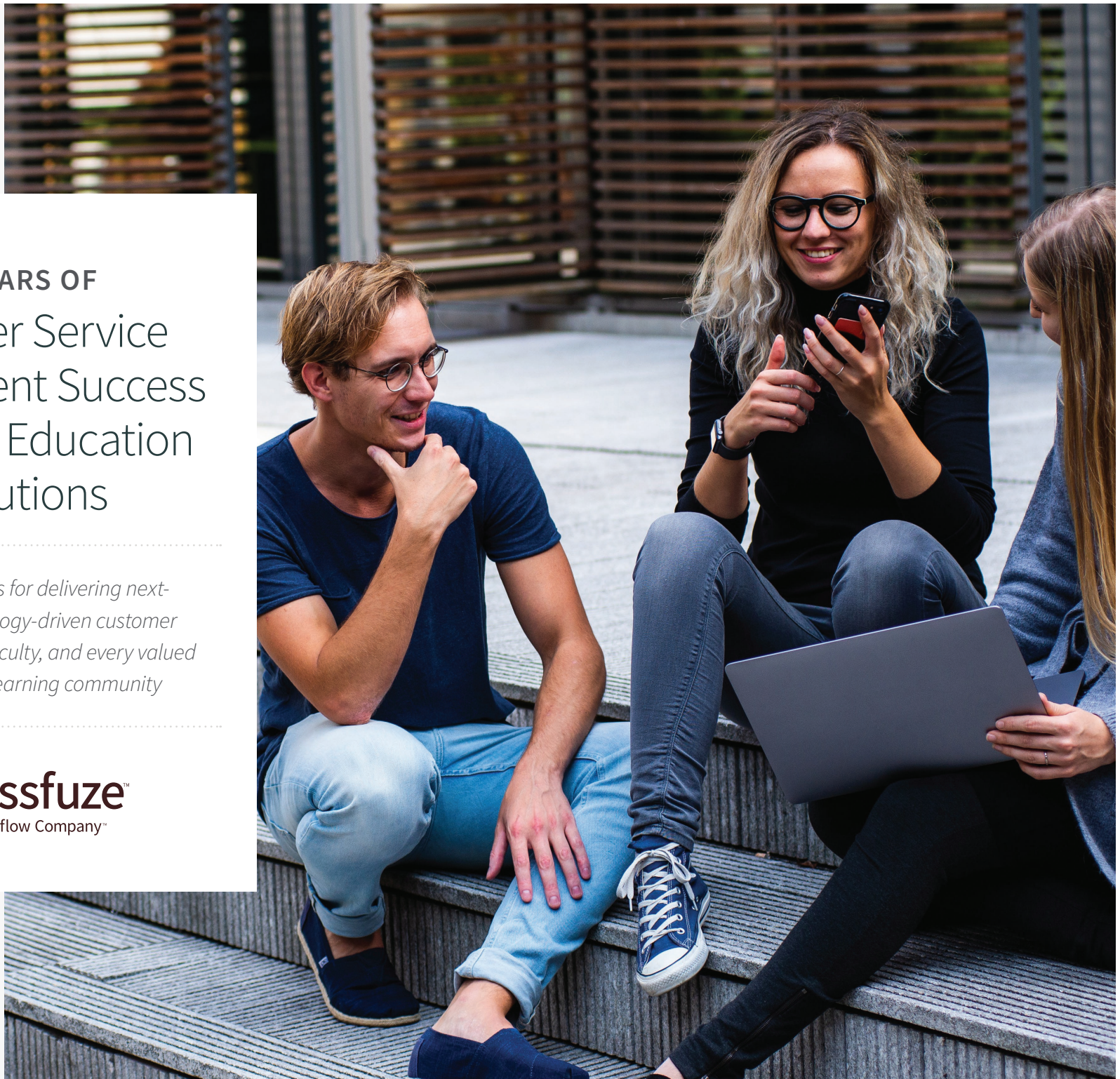**7 PILLARS OF**

Customer Service Management Success for Higher Education Institutions

Essential strategies for delivering next-generation, technology-driven customer service to students, faculty, and every valued member of your learning community

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The Workflow Company™

Crossfuze™
The Workflow Company™

Why Crossfuze?

Crossfuze helps enterprises to create a competitive advantage in the world of work. Through transformative technology, innovative workflow design, and exceptional customer and employee experiences we're changing the way work works.

Why "The Workflow Company?"

Operational improvement isn't the only goal. The best companies improve both the employee and the customer experience. Thankfully, experiences can be dramatically improved faster than ever before through workflow improvements and innovative technology.

LEARN MORE

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Introduction

For generations, higher education institutions have delivered services in highly personalized, tailored ways. From helping students enroll in classes, to responding to faculty service calls, to collecting tuition payments, to hosting campus events, these services have long played a foundational role in helping the institution achieve its core educational mission. Simply put, without these services, the institution would cease to function. Meanwhile, behind this diverse array of services are legions of dedicated service professionals whose talents and experience make the delivery and management of these services possible.

At the same time, service teams in higher education tend not to be fully aligned, coordinated, and in sync. Especially because services have tended to evolve over time without central planning, service teams have developed their own workflows, their own recordkeeping systems, and their own ways of using their data to drive continuous improvement. These traditional workflows tend to be siloed and not readily scalable as demand for services grows. Moreover, the data generated by these services often isn't readily shared with other teams, either because of privacy and security reasons or because of bureaucracy and internal politics. As a result, data related to the delivery and management of services can't be used to drive continuous improvement and enhanced customer satisfaction.

To overcome the shortcomings of legacy service delivery methods, higher education institutions increasingly are turning to technology.

> Having a modern, unified platform for managing the delivery of customer service is foundational in an institution's efforts to improve, expand, and enhance the service experience—for students, for faculty and staff, for parents and alumni.

With the right platform for managing services, educational institutions become better-positioned to deliver more services in the ways that their customers prefer, and to collect and use data to optimally drive improvements to the service experience.

For all of an organization's customer-service needs, higher education institutions need to think like the businesses their graduates will soon populate. And develop customer-centric, workflow technologies that put the student, faculty, staff and alumni front and center. One such technology is Customer Service Management (CSM) from ServiceNow. This user-friendly, all-encompassing platform provides the features and functionality that educational organizations need to deliver services reliably, consistently, and to exacting quality standards. The CSM platform was originally developed for the business world, where companies of all sizes and across all industries rely on CSM to strengthen satisfaction and loyalty among their customer base. Just as in business, every educational institution has a critically important base of "customers" whose satisfaction and loyalty toward the institution is shaped by the quality of the services they receive. That makes CSM not just a nicety for higher education, but a necessity.

To achieve the digital transformation that CSM makes possible, it's up to higher education institutions to develop a strong command of what CSM has the potential to be. Thus, the goal of The *7 Pillars of CSM Success for Higher Education Institutions* is to introduce transformation-minded educational leaders to the thought processes, considerations, and priorities that should be front and center as they prepare to implement CSM. This book will describe the seven most crucial elements, or pillars,

for higher education leaders to understand as they work to realize the full promise and potential of CSM.

The *7 Pillars of CSM Success for Higher Education Institutions* represents a distillation of years of insights and wisdom from the experienced implementation experts at Crossfuze™, a leading ServiceNow® Elite Partner that specializes in helping organizations across both the public and private sectors to achieve meaningful digital transformation with ServiceNow. We will ensure your institution stays laser-focused on the implementation elements and aspects that are most critical to achieving success with CSM, and that make optimal use of your limited resources and bandwidth.

At the same time, a single book can't replace years of battle-tested, customized expertise. That's where Crossfuze can step in and pick up where your experience, your vision, and your ambitions leave off. No matter where you are on your CSM implementation journey, **Crossfuze is ready to be your partner and your mentor, helping you transform how you deliver and manage services across your organization.**

But first, it's time to explore the seven most essential elements that educational institutions need to know to achieve CSM success.

PILLAR 1:

Establishing the strategic value of your services

Meet Tony

Tony is a long-time IT director at a small liberal arts college who is responsible for shaping the student experience. **He recognizes the value of investing in consumer-grade experiences for students that rival Google or Amazon, but his college's senior administration is skeptical.** The college is a traditional institution with traditional ways of thinking and problem-solving, so the administration sees consumerizing the delivery of student services as a superficial, superfluous initiative that will be costly and provide a questionable ROI. Tony knows that the student body doesn't view this situation the way the college's senior leadership does; in fact, the college is beset by clunky, non-integrated systems for managing everything from class registration to counseling center appointments—and Tony has heard time and again from these students that they are having negative experiences that are leaving them frustrated and annoyed. How does Tony convince campus leadership that modernizing the delivery of student services is a strategically important initiative?

The resistance to modernizing student and operational services that Tony is experiencing is common in higher education. And yet that resistance is absolutely worth overcoming. In fact, as the cost of higher education skyrockets, higher education institutions are under intense pressure to increase perceptions among students about the value they provide. A whopping **65% of college students today feel that college is not worth the cost**, according to a 2021 study from the Third Way and New America think-tanks.

One of the most foundational and yet overlooked strategies that higher education institutions can take to increase their value proposition is to give students a high-quality student experience. Students—and for that matter, faculty and staff—should never be forced to struggle with outdated, disconnected systems. Not only are these systems cumbersome, but they also distract and take valuable time away from the institution's core educational mission.

To convince senior leadership that modernizing service delivery is a strategic priority, higher education institutions need to first establish the strategic value of the services themselves. In other words, **it's counterproductive to sell leadership on a service modernization journey if they haven't bought into the underlying value of the services themselves.** Whether the service is financial aid or counseling center appointments or maintenance requests, education leaders need to be explicitly reminded of the wide variety of student and operational services offered by their institution, and the synergistic way that all of these services combine to shape the overall educational experience. Let's explore five essential strategies for establishing the strategic value of student and operational services at your institution:

65%

of college students today feel that **college is not worth the cost**

THIRD WAY & NEW AMERICA THINK TANKS

01. Spotlight the specialization and expertise of various service teams:

Every higher education institution is filled with talented, experienced professionals who provide highly specialized services to students and others across the organization. **These service teams rarely get the same level of attention and spotlight as faculty does.** Thus, it's important that senior leadership is reminded of just how diverse and specialized all of these service teams are, and how integral they are to the organization. The contributions and achievements of service teams should be celebrated the same way that faculty successes are, and their stories elevated to the same level of prominence as faculty stories tend to be. **Just as faculty are constantly put on pedestals for the rare and unique talents they bring to the campus, so too should service teams be put on these same pedestals.** When campus leadership is convinced that support staff bring as much to the table as faculty, they're more likely to recognize that these support staff deserve access to the same technology as their faculty counterparts.

02. Chronicle the role of services in supporting marketing and branding initiatives:

Campus leadership tends to believe that the core value of their institution lies in the quality of the classroom educational experience. While that may be true, most campus marketing teams don't sell students on the value of the education itself—they also sell students on the quality of the support services offered. Thus, as you're looking at how to heighten perceptions about the value of campus support services, marketing and branding teams are a key partner and ally. These teams can explain how they market campus service offerings to students and establish a strong brand identity for the campus using the campus services. Moreover, marketing teams have a keen sense of how improving the delivery of these services would directly translate to stronger marketing campaigns that attract more prospective students.

03. Chronicle the role of support services in reputation management:

Students, as well as faculty and staff, are spoiled by increasingly high-quality, high-tech consumer experiences in their personal lives. As much as campus leadership may believe that these same audiences are willing to forgive subpar service experiences from their institution of higher learning, younger generations aren't always willing to overlook this increasingly pivotal, defining aspect of the educational experience. When systems fail, when technical glitches frustrate users, when it's difficult to even request services, these problems create negative brand impressions. **And when these negative impressions reach a fever pitch, they erode the institution's overall reputation**—in online reviews, in social media conversations, in word-of-mouth recommendations. Thus, it's important to chronicle the pivotal role that the quality of campus services plays in shaping the institution's overall reputation. Even if senior leadership isn't convinced that service quality is a priority in its own right, there's a chance they'll prioritize service quality if they can see how it impacts reputation.

04. Mine data from service teams to produce relevant insights:

Service teams do more than just provide essential, high-quality services at higher education institutions. They also have a pulse on aspects of the campus experience that can be measured, quantified, and analyzed—and ultimately used by senior leadership to drive decision-making and long-term planning. For example, the financial aid office knows how many students make contact to inquire about different specific facets of their financial aid packages. Network repair teams know how many service calls they get to fix which specific types of networking problems. When service teams are able to mine their own data to produce insights relevant to senior campus leadership, it shows senior leadership that service teams are capable of doing more than just taking care of the tasks in front of them. They also can share the data they're collecting to provide strategic insights into how the organization is doing, so these insights can be used to help shape where the organization goes next.

05. Establish KPIs for services to reinforce continuous improvement:

Best-in-class service teams should aspire to do more than just maintain the status quo. They should be looking at ways to provide their services more rapidly, efficiently, and cost-effectively. And there's no better way to do that than by establishing clear performance metrics. By holding themselves accountable to goals and bars for success, service teams are able to demonstrate to senior leadership that they are committed to continuous performance improvement. Moreover, service teams are able to show the institution that their value to the organization is not static; rather, their value is constantly increasing—and worthy of being prioritized.
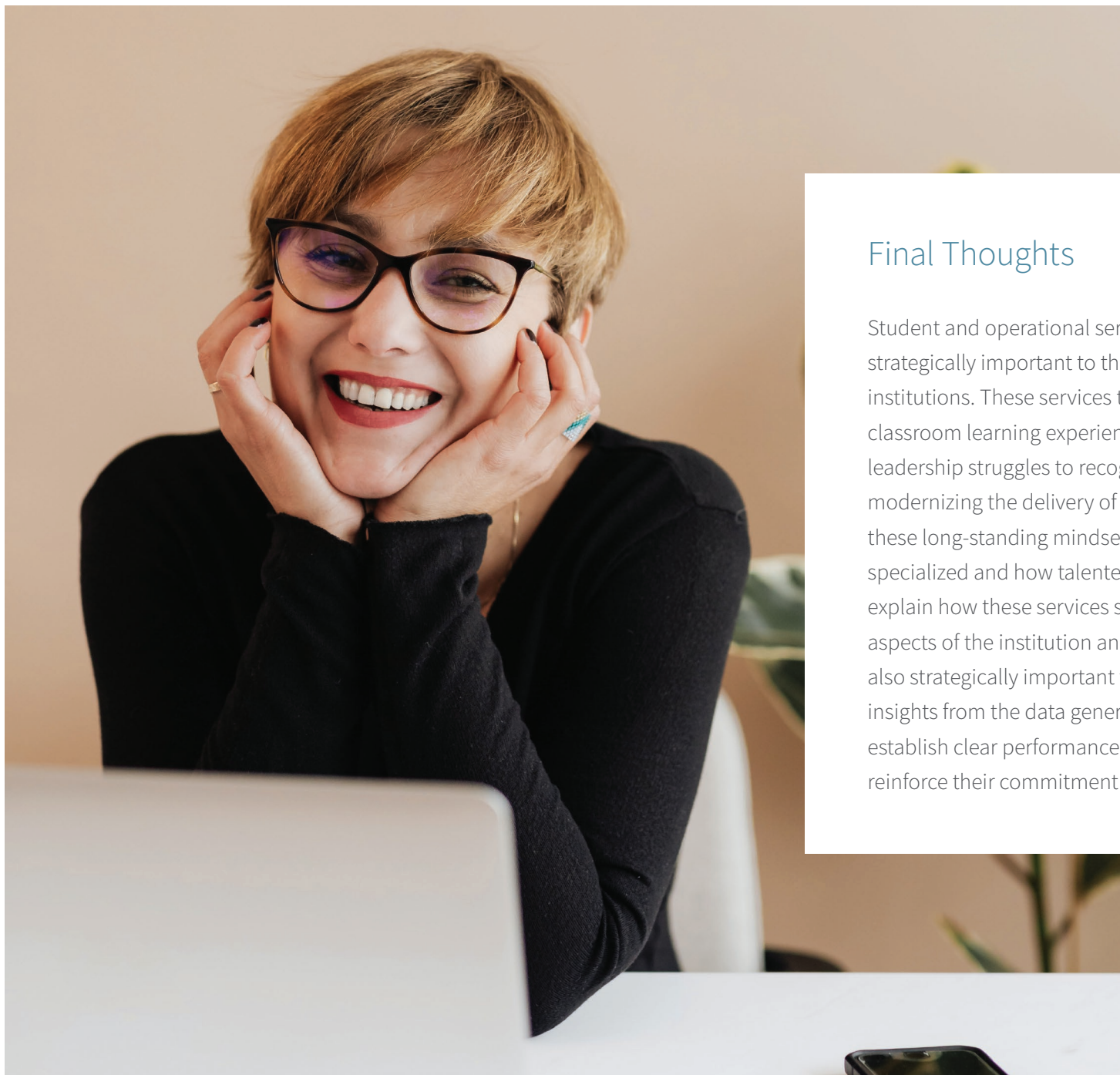
Final Thoughts

Student and operational services are rarely recognized as strategically important to the health of higher education institutions. These services take the backseat to the core classroom learning experience. As a result, senior campus leadership struggles to recognize the strategic value of modernizing the delivery of these services. Thus, to change these long-standing mindsets, it's critical to spotlight how specialized and how talented service teams are, as well as explain how these services shape both the marketing/branding aspects of the institution and the institution's reputation. It's also strategically important to produce and share relevant insights from the data generated by service teams, and to establish clear performance measures for service teams that reinforce their commitment to continuous improvement.

PILLAR 2:

Developing a clear path forward for CSM success

Meet Colleen

Colleen is a newly minted dean of parent and alumni relations for a regionally ranked private university. Earlier in her career, she worked as the director of a call center in the corporate world—a job that underscored for her the importance of a customer service-oriented mindset. Colleen continued to closely follow customer service trends as she transitioned to higher education. And now, in her new role as dean, she recognizes that every aspect of how her university delivers customer service is in desperate need of an overhaul. Although her predecessor never saw relationships with parents and alumni as essentially boiling down to a series of customer service interactions, Colleen recognizes that the customer service mindset is foundational to strengthening connections that parents and alumni have with the university. Unfortunately, Colleen is acutely aware that the university is struggling to provide timely, complete information to parents when they make contact, and moreover, to make those parents feel like valued members of the university family. Similarly, Colleen sees that the university is struggling to build relationships with alumni; the university simply doesn't have the necessary systems in place to properly scale its alumni infrastructure. Although Colleen is convinced that ServiceNow's Customer Service Management (CSM) platform is the optimal path forward, campus leaders are skeptical about such a tech-centric solution. They view CSM as a technology initiative that might be appropriate for the corporate world from which Colleen came, but find it too slick for an educational setting—a more traditional setting where the customer experience is built largely around highly customized, non-scalable interactions. Colleen disagrees wholeheartedly. How does she convince university leadership to take a chance on CSM?

For customer experience professionals like Colleen, getting support for technology initiatives like CSM can be a tough sell. Meanwhile, the consequences of trying to implement CSM without full support of the organization can be disastrous. **Just 19% of organizations are able to deliver successful IT projects a majority of the time**, according to 2019 research by KPMG, AIPM, and IPMA. **The reality is that the customer experience transformation that CSM makes possible requires full buy-in and support from all levels of the institution.** And getting that buy-in needs to be a priority for any institution, long before asking campus leadership to even make a final decision on CSM. Let's explore five foundational steps every higher-education institution should be pursuing to put the organization on a clear path forward to achieve CSM success:

19%

of organizations are **able to deliver successful IT projects** a majority of the time

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KPMG, AIPM, IPMA RESEARCH

01. Articulate a long-term vision of what CSM success looks like:

Like any technology platform, CSM will only be as successful as the best use case that's envisioned for it. CSM is a powerful, customizable platform, but its **implementation ultimately needs to be driven by a clear, long-term vision** for how the organization will use it to reimagine the delivery of customer service. In a higher education setting, the key to articulating this vision is to define precisely what will change as a result of CSM—and why that change matters. Unlike a typical business setting, where the focus is on boosting sales and profitability, the bottom-line goal of CSM modernization in a higher-education setting is to build credibility and confidence among students, faculty, staff, parents, alumni, and all other members of the community. The enhanced customer experience that CSM creates needs to lead to direct, tangible impacts on customer perception, affinity, and loyalty for the institution. Once an institution has articulated this long-term vision, everything else starts to fall into place: Others get excited about this vision and want to support it and see it come to fruition.

02. Build a business case that ties CSM to strategic institutional goals:

Creating modern, seamless customer experiences does not happen in a vacuum; all of the bells and whistles that an institution implements should be linked to the organization's strategic institutional goals. In other words, every element

of CSM should somehow advance the type of place that the institution is working toward becoming. If a strategic goal of the institution is to strengthen its connections to alumni, then that goal should be tied to CSM's potential to create a robust online alumni network, and to enable alumni to easily donate, and to stay informed about campus events. When you can articulate the relationship between CSM and the priorities and goals that the university already has laid out for itself, you're building a business case for CSM. Your business case, not coincidentally, resonates with institutional leadership, which is constantly evaluating all initiatives through the lens of how they advance the institution's mission and goals.

03. Develop an ambitious, achievable roadmap for implementing CSM:

CSM is too much of a gamechanger and a transformation enabler to get everything out of the platform that you want—at least not right away. The only viable way to achieve success with CSM is to think of implementation as a journey with multiple parts. Long before you embark on this journey, you want to flesh out a **detailed implementation roadmap that breaks apart the journey into discrete phases.** Not only will creating this roadmap help you focus and improve your own planning processes, but it also will help others to understand what to expect at various points and how individual tasks fit into and advance the bigger picture. Finally, it's important to design your roadmap to be readily modifiable later, so the roadmap can accommodate unanticipated setbacks and changes that don't completely derail progress.

## 04. Incorporate early CSM wins to build confidence and forward momentum:

As you develop your CSM vision and implementation roadmap, you want to stack the deck in your favor by building early, guaranteed victories into the journey. Early victories are the incremental, guaranteed home runs that will motivate and inspire your team to continue working toward the institution's long-term CSM vision. By deliberately planting guaranteed wins on your path, you are also buffering against potential future demoralizing moments—the sorts of unexpected problems that can have disastrous consequences for forward momentum and buy-in.

05. Evangelize CSM plans and progress far and wide:

An institution's success with CSM implementation is directly dependent on the ability to get buy-in for a long-term CSM success vision, as well as for the associated implementation roadmap. One key way to gain more universal buy-in is to talk up plans with as many "influencers" in your organization as possible. Influencers encompass both more senior leaders and the in-the-trenches folks who, by nature of who they are, command trust and respect from their peers. When you evangelize to influencers, you're getting them excited and invested in your plans and progress. And when they're excited and invested, they instinctively help amplify these plans and progress across the organization, enabling you to reach far more people than you could do alone.

Final Thoughts

Putting an organization on a path to CSM success starts with getting buy-in for the long-term plans, goals, and priorities for CSM. Long before any contracts are signed and any specs are discussed with IT, the institution should be prepared to articulate a long-term vision for what success looks like, build a business case for CSM that is linked directly to the institution's strategic goals, design an implementation roadmap that is ambitious yet achievable, think strategically about how to guarantee early CSM implementation wins for the organization, and evangelize plans and progress for CSM far and wide.
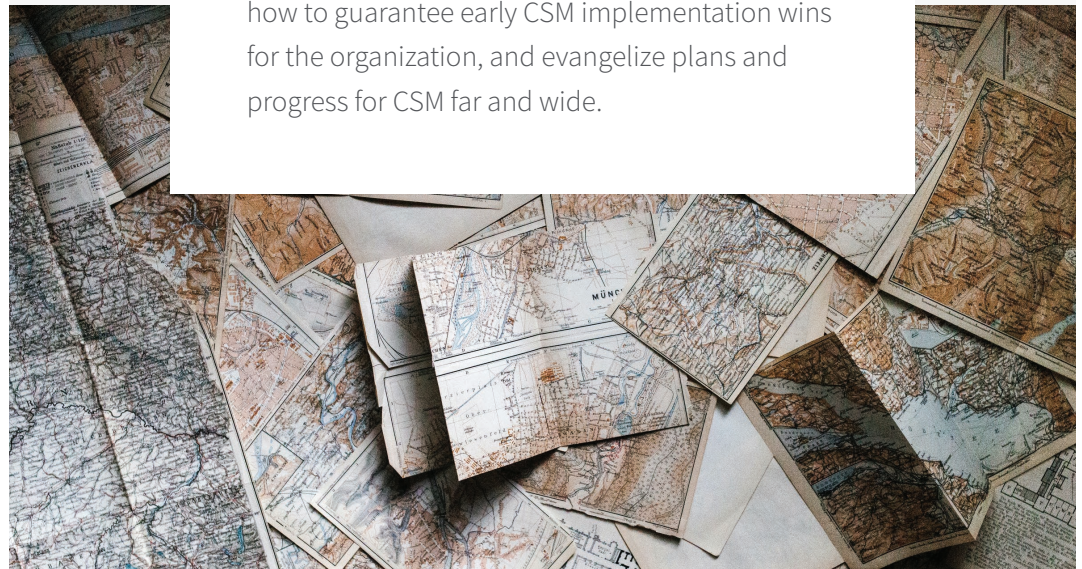
PILLAR 3:

Understanding what your customers want

Meet Tim

Tim is the long-time senior vice president for enrollment and student services at a multi-campus technical college. The college faces fierce competition for students, even as campus leadership has set ambitious growth targets for student enrollment. Meanwhile, Tim has observed that competitors have been making big investments in improving and enhancing the student experience. Among other things, they've streamlined the online application process, introduced self-contained portals for accessing student services, and simplified the process of scheduling appointments with academic advisors and financial aid counselors. Tim also has observed that students, faculty, staff, parents, and all other members of the college community are increasingly coming to expect high-quality, technology-driven consumer-like experiences. Moreover, these "customers" view these experiences as a key differentiator in deciding where they want to enroll. Tim recognizes that his own institution needs to play catch-up, but he's not sure where to start. He doesn't know which services are most valuable and strategic to invest in first. Meanwhile, Tim recognizes that the transformational changes he's working toward will take time, and that he'll need to build a plan for catching up to the competition incrementally. How does Tim figure out how to focus his time and efforts to meaningfully and effectively improve the student experience?

For higher education leaders like Tim, it's a constant struggle to make decisions about what sorts of experiences and services the institution should prioritize creating for students, faculty, staff, and others. In the wake of the COVID-19 pandemic, for example, **67% of college students reported that it's important to them to have access to messaging and collaboration apps through school** so that they can connect with instructors and classmates, according to a 2021 study by the courseware platform provider Top Hat. While there will always be an endless list of capabilities and services that could be built, it's simply not possible to do it all. Every organization must make conscious decisions about what services its community of customers wants and needs, and then work expeditiously to design and build those services—hopefully faster and better than the competition.

No matter what kinds of services you're considering developing, the areas that you should invest in first should be shaped by understanding what your customers want. For CSM solutions to resonate with the community that higher education institutions serve, the solutions must involve a solid understanding of what these customers want and expect when they request and consume services. A prospective student, for example, might want an app that allows them to upload required documents, access their application status, and communicate with an admissions counselor. A currently enrolled student might want recommendations on which courses to take when, based on major and graduation requirements. A faculty member might be looking for a unified platform for completing administrative tasks, so they can stay focused on teaching. A staff member might need a self-service option for making maintenance and repair requests. Every institution is different in terms of the priorities, preferences, and needs of its end-user community, and it's up to the institution to be listening and learning from what these customers want. At the same time, an encompassing platform like CSM requires some universal design principles and implementation philosophies that will help any organization **optimize the platform to meet strategic, long-term organizational goals.** Let's explore five universal design principles for designing optimized experiences that will give higher-education customers the service they want:

67%

of college students reported that it's **important to have access to messaging and collaboration apps** through school

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TOPHAT

01. Diversify options for service teams to communicate:

No matter what type of service an institution offers, communication between the customer and the service provider is foundational to resolving an issue. And increasingly, customers in the world of higher education don't want to be limited to just phone calls and emails. When customers encounter problems or need help, they might prefer a live chat option, or a texting option, or communicating through a social media messaging platform. Still others won't want to engage with anyone at all: They will seek out online resources for the answers to their questions, and when they can't find what they're looking for through self-help options, they may be more likely to drop the issue entirely instead of making contact with a live person—an unfortunate outcome all around. To solve these customer expectations around communication, higher education institutions need to **prioritize diversifying options for service teams to communicate**, as well as unifying all of these contact channels and communications records under an integrated customer service platform. CSM, of course, is the ideal integrator, enabling organizations to offer services through diverse channels while simultaneously providing consistent, seamless service across every channel.

02. Prioritize speed and accuracy for resolving service inquiries:

No member of a higher education community wants to be put on hold, transferred from one department to another, or stuck with a misinformed, ill-prepared service team. Indeed, that's the fastest way to show your customers that they aren't valued and that their time isn't important. Thus, it's critical to prioritize speed and accuracy when designing workflows for providing services. CSM gives organizations the infrastructure they need to meet this challenge head on, with features including intelligent routing, virtual agents, and predictive technology to proactively identify customers requiring service. Higher education institutions should be taking advantage of these features wherever possible to get customers to optimal solutions as rapidly and consistently as possible.

Every institution should be creating platforms through which individual members of the higher-education community can share knowledge and insights about how to work through specific issues, from workarounds for internet connectivity issues to best practices for nabbing last-minute appointments at the student health center.

03. Create robust knowledge databases that encourage self-service solutions:

In higher education communities, virtually everyone believes that the answer to any question can be googled; indeed, that's the first place most people will turn. And there's no reason to fight reality: Every institution should be putting as much information online as possible, and making it as discoverable as possible. Furthermore, every institution should be creating platforms through which individual members of the higher-education community can share knowledge and insights about how to work through specific issues, from workarounds for internet connectivity issues to best practices for nabbing last-minute appointments at the student health center. Even though the sources are unofficial, the insight and specificity generated through community posts simply cannot be matched by the institution attempting to replicate this knowledge base on its own. Best of all, ServiceNow's core Now platform supports the development of these knowledge bases, including a **Social Q&A** option, where anyone can post a question that anyone else can answer, while others can upvote the most helpful and relevant responses.

04. Build capacity to spot trends and diagnose root causes:

Higher education institutions traditionally deliver services on an individual, highly customized basis—as if each case presents an entirely new and unique problem. The reality, however, is there are often commonalities at the root of individual problems. Customers today expect that businesses will use these commonalities to more rapidly and efficiently diagnose and resolve their own problems. In other words, it isn't just inefficient for a business to reinvent the wheel with each customer case; customers also are aware that other cases have come long before the customer's own that have created institutional knowledge and trends—and customers expect that these insights will be leveraged to more efficiently resolve their issues. CSM is built from the ground up with these capabilities, enabling organizations to **quickly spot specific trends**, such as an internet connectivity problem affecting faculty offices in one particular building. CSM is also continually analyzing service data in an effort to better understand and diagnose the potential root cause of issues. For example, CSM might recognize that a sudden uptick in IT tickets for password resetting support for a student portal is indicative of a systemwide outage affecting the portal itself, enabling the IT team to jump on the outage itself instead of providing piecemeal password-resetting support.

05. Use predictive AI technologies to anticipate what customers want and need:

In a higher education community, everyone is busy all the time. Every moment that faculty, staff, and students spend seeking out services is another moment that saps away time from the core educational experience. Thus, higher education institutions should be looking for ways to not just provide high-quality services when these services are sought out, but also to anticipate and proactively offer services before the customer even realizes they need to seek service. In particular, CSM is powered by predictive AI technology that can automatically review service issues, then develop suggestions for what services the organization should proactively offer. For example, if CSM identifies a trend in which multiple parents are calling to report that tuition payments made after a certain date are not posting to student accounts, the institution can proactively send out an email blast to let all parents know that the accounting office is aware of this glitch and is working to fix it. That single email can save countless individual service calls from concerned parents, even as it puts parents' minds at ease that the institution is on top of such issues.

Final Thoughts

As much as every higher education institution's customers have a range of unique preferences and expectations, these same customers all have a shared set of priorities that should guide the design and implementation of CSM for every institution. To ensure an institution adheres to best practices when designing customer service experiences, it's important to always be thinking about how to diversify the channels through which services can be provided, prioritize speed and accuracy in resolving customer inquiries, build out knowledge databases that provide robust self-service support options, and take advantage of cutting-edge technologies to spot trends, diagnose root causes, and proactively predict what customers will need—before they even realize they need to reach out for support.

PILLAR 4:

Building 360-degree customer views

Meet Erica

Erica, the executive vice president of technology services for a major research university, is responsible for building and managing workflows that control a wide range of administrative services across the university. From instructors who need to request IT support for their classrooms, to research scientists who need their laboratories to be properly stocked and cleaned, to vendors trying to schedule deliveries and make service calls, these workflows are central to the ability of both internal and external customers to request services and maintain control over their work environment. Not only do these customers expect that all administrative tasks will get taken care of rapidly, consistently, and to exacting quality standards, but these customers also expect that they won't be forced to jump through hoops to get what they need. Erica, who formerly worked as the CIO for an educational

services platform, understands that the best way to improve, streamline, and optimize workflows for all of these customers at her university is to start by amassing customer data. With detailed, granular, real-time data, Erica will be able to see exactly how work is getting done across the university, how customers are interacting with administrative teams, and precisely where bottlenecks, communications breakdowns, and quality lapses are occurring. Erica knows these types of specific, actionable insights are foundational to tweaking and optimizing workflows across her university. She also knows that she wants to implement CSM, a tried-and-true system for collecting, managing, and analyzing all of the data she'll need. How does Erica go about taking full advantage of CSM to optimize how customers receive services across the university?

The challenge in front of Erica is hardly uncommon in higher education. In fact, the hard work of unifying customer data to build 360-degree customer views is a common challenge throughout the business world. For example, **barely half of retailers report that they've implemented a single customer view** to understand their customers in a comprehensive, data-driven manner, according to a recent study conducted by research firm Vanson Bourne. Like any business, academic institutions struggle to use customer data effectively to optimize how services get delivered. Even when higher education institutions recognize the strategic value of collecting copious data on how their customers interact with the institution, they often don't have the infrastructure and workflows in place to comprehensively collect and analyze this data to improve how services get delivered. In fact, where this data exists at all, it tends to be stored in **static databases that are deliberately siloed** from the rest of the organization.

For CSM to provide actionable insights, the platform needs to have access to a rich, comprehensive stream of customer data. The best CSM implementations, in fact, provide the organization with insightful, 360-degree views into **how customers think, act, and react** when they request and consume their organization's services. Let's explore four key CSM data initiatives that higher education leaders should prioritize implementing to ensure the organization is building robust, 360-degree customer views and generating relevant, actionable insights from this data:

The best CSM implementations provide an organization with insightful, 360-degree views into how customers

THINK, ACT, AND REACT

01. Increase the visibility and accessibility of CSM data:

For many higher education institutions, the biggest impediment to building 360-degree customer views isn't a technical shortcoming; it's partnering with teams and departments across the institution, working to convince them they should share their data and allow it to feed into CSM. Indeed, data tends to live in siloes in educational institutions—typically, because individual departments want to maintain control and ownership of their data, or because of confidentiality and/or security concerns. These concerns can be overcome, of course, but it requires reaching out to traditionally siloed departments and showing them the strategic value of letting CSM have access to their data—while simultaneously assuaging their concerns about security and privacy of the shared data.

### 02. Link CSM data strategically to deliver maximum insights:

CSM data is just noise until it's analyzed in a way that delivers actionable insights. While CSM provides the infrastructure that makes these data analyses possible, it's up to every institution to figure out which data to analyze—and in which specific ways to analyze the data—to deliver maximum insights. For example, if an organization is hearing anecdotal reports about janitorial services not cleaning every classroom every night, the institution can do much more with CSM than just manage individual service tickets. Instead, the organization can use CSM to analyze the data across all of these service requests, looking for trends and other insights that could explain why the classrooms aren't being consistently cleaned. Perhaps as a result of being able to see precisely when and where service interruptions are occurring over the course of a month, the organization will be able to determine what the custodial department can modify about its workflows, or alternatively, the organization might discover that there are circumstances beyond janitorial's control that are causing the service interruptions. The key is to recognize that seemingly disparate and disconnected data sets—when linked together in CSM—can suddenly provide a **wealth of actionable insights.** Once an organization appreciates what kinds of insights can be extracted from customer data, it's just a matter of deciding how to optimally configure CSM to deliver those insights.

03. Enrich CSM data with relevant contextualizing information:

The data that is collected by an organization is foundational to building 360-degree customer views, but self-collected data is not the only type of data that an organization needs. Organizations also should be looking for opportunities to enrich their data with third-party data to provide more context and shed more light on the data analyses. For example, if an educational institution uses CSM to collect data on the number of calls it receives for IT network repair service, the organization shouldn't be limiting itself to only tracking trends on when and how often network outages are occurring. The institution also should be enriching its data with third-party intelligence that, for example, contextualizes for the institution the most common causes of network outages, or walks an IT team through exactly what diagnostic steps to undertake after receiving the first report of an outage. This contextualizing information extends the value of user-collected CSM data, ensuring the data is continually generating actionable, relevant insights.

04. Cleanse and standardize CSM data:

For an educational institution to count on CSM data to optimize workflows and identify problems, the institution needs to be able to count on the data's accuracy. That's why—in addition to simply getting the data into CSM— the data needs to be cleansed and standardized. Ideally, quality-control checkers should be set up to automatically reject data that won't be able to be read and understood by CSM's analytics tools later. But more than just blocking problematic data, the institution should be proactively training teams in how to consistently generate relevant, high-quality data in standardized formats.
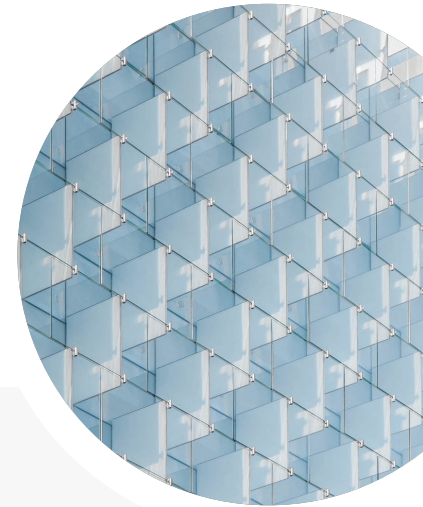
Final Thoughts

When an educational institution is able to offer 360-degree customer views, that means it's able to collect the data needed to understand how services are being delivered across the organization. To build these 360-degree views within CSM, an organization should be prepared to make foundational investments in its data collection capabilities. These investments include ensuring that all relevant data is fully accessible to and shared with CSM, developing a strategy for linking disparate data sets to provide actionable insights, enriching CSM data with contextualizing information, and implementing processes to cleanse, standardize, and maintain the quality of CSM data.

Connecting your service teams to technology

Meet Emmett

Emmett has just been promoted to a newly created position in his community college district called senior vice president for academic innovation. He's tasked with providing more structured, rigorous professional development services for the college district's nearly 700 instructors—the majority of whom are part-time instructors and adjunct faculty. The instructional services department that Emmett is in charge of has been around for decades; its mission is to empower and train professors, lecturers, adjuncts, and teaching assistants across the community college district to be the best educators they can be. In the past, the instructional services team focused on more traditional, highly customized forms of training and support. Emmett's priority is to make this training more standardized and more consistent across the district, including by rolling out a series of online training modules that every instructor will be asked to complete on an annual basis. Emmett's goal is for the training program to be able to track completion rates and award digital certificates to participants for successful completion of individual modules.

Meanwhile, Emmett also is planning to roll out a web-based peer mentoring and coaching program that will support newer instructors by connecting them to multiple resources, including one-on-one peer mentoring.

To implement these services, Emmett recognizes that he'll need to train his department to support all of the instructors who will be using these new systems. Fortunately, Emmett recognizes that all of this customer-facing support can be administered, managed, and monitored using ServiceNow CSM. Thus, Emmett feels confident about his choice of technology: He knows CSM will be a reliable, cutting-edge platform for managing the new customer service functions his department will be rolling out. However, Emmett is concerned about the adoption side of technology implementation—specifically, how to get his department to successfully transition away from legacy ways of providing technology support to instructors. What can Emmett do to ensure his department embraces CSM to deliver and manage services?

When educational leaders like Emmett implement new technology like CSM, they should be devoting equal weight—if not more weight—to supporting end users of new technology. This type of support is desperately needed. Just **one-fifth of business executives say their workforce has the skills necessary to keep up with rapid advances in technology**, according to 2020 Deloitte industry research. The best way to train service teams to deliver customer service in fundamentally different ways is to invest in proper education, training, and support. Let's explore five essential strategies for connecting your service teams to new technologies and new ways of getting work done:

1 IN 5

business executives say their workforce **has the skills necessary** to keep up with advances in technology

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DELOITTE RESEARCH

01. Align new technology to your service teams' goals:

The teams that provide services in a higher-education environment are dedicated, hard-working, highly skilled professionals. When new technology is being rolled out, they necessarily tend to be skeptical. After all, they don't want to waste time investing in technology "fads" and half-baked technology ideas, especially not when they could be spending this same time actually providing services to their customers. To overcome this inherent resistance, it's important that organizations clearly explain that an investment in CSM is a strategic investment in helping service teams to do their jobs more effectively. To make this connection for end-user service teams, it's critical to clearly explain how the service-oriented goals of **end users are perfectly aligned to what the technology is capable of doing.** For example, if an instructional services team's goal is to ensure every faculty member can successfully complete an online educational course, you want to show this team how CSM offers intuitive tools and resources they need to help faculty achieve a 100% completion rate.

02. Identify pain points faced by service teams— and offer up a CSM-centered solution:

More than just showing how technology can optimize how work gets done, higher education institutions also should be looking to show their service teams how CSM solves problems. This process starts by working to understand at an in-depth level what sorts of unresolved challenges and problems that service teams face as they go about their daily jobs, then showing these teams how CSM can solve these pain points in an automated, cost-efficient, time-efficient manner. For example, let's say a service team is tasked with managing requests for support for an online faculty training program. If the service team has received multiple reports that the system is not properly marking individuals as having completed the program, the team might feel that their only option is to open a separate IT ticket for every affected individual, and then manually work with IT to fix each faculty member's record individually (and manually close out each case at the end). In this case, CSM could be presented as an essential solution to a cumbersome pain point: CSM would automatically flag all of these issues as part of an overall pattern, enabling the service team to open one IT ticket and fix the root cause of the problem, which benefits every faculty member going forward.

03. Implement CSM features and capabilities with a long shelf life:

CSM technology can be configured in countless ways to improve how customer service is delivered, managed, and optimized. As higher education institutions assess which CSM features and capabilities to implement, it's important to make these assessments through the lens of their long-term relevance and applicability. You want to choose features with a long shelf life that won't need to be replaced or revised in the short term. That's how you'll avoid whiplash, where service teams become so consumed with keeping up with technology that their ability to deliver these services becomes compromised. A service team's primary focus should be on serving customers, not to mastering complicated, ever-changing technology.

04. Recognize and incentivize early technology adopters:

To encourage service teams to embrace CSM, higher education institutions should be celebrating the individuals who are first to make this leap. Often, it's the **early adopters of technology who pave the way** for others behind them—and indeed, create the first ripple that ultimately builds into a wave. CSM, fortunately, is exceptional at tracking precisely who is using CSM to its fullest extent, making it easy to spot these trailblazers and recognize and incentivize them.

05. Encourage feedback and suggestions from front-line teams:

Service teams in higher education are on the front lines every day and have an intuitive sense of what can be changed and overhauled. Thus, as workflows are being architected, it's critical to involve these teams in the planning process. Not only will you end up with stronger, more viable workflows, but you also will engender buy-in and support among these end users for precisely the technology you're hoping they will adopt and embrace.

Final Thoughts

A critical component of rethinking and reimagining how customer service is delivered is ensuring that service teams have the education, training, and support they need to successfully connect with the underlying technology. Creating these connections starts with aligning CSM technology to the existing goals of service teams, as well as showing how CSM offers solutions to specific pain points faced by service teams. To strengthen the connections between service teams and technology, higher education institutions also should be designing their CSM implementation with longevity and consistency in mind, recognizing and incentivizing individuals who are among the first to embrace CSM, and encouraging meaningful feedback from end users at every stage of the CSM implementation process.

PILLAR 6:

Creating consistency in omnichannel delivery

Meet Stacy

Stacy is the newly installed director of student recruitment and marketing for a multi-campus vocational trade school. She's responsible for coordinating the activities of a student success team that engages with incoming and prospective students. This team is supposed to ensure that every student has the information and resources they need, answer questions from students, and make every student feel welcome and valued. The problem, however, is that the team doesn't actually operate as a cohesive team. Individual team members don't report exclusively to Stacy; they come from other departments— including admissions, financial aid, and recruitment and marketing operations—so they identify more with their home department and don't do much planning with one another.

Although Stacy's job is to help student success team members work more effectively together as a team—and even to see themselves as part of an interconnected whole—Stacy faces an uphill battle. Team members are using a siloed, cobbled-together set of tools (including social media, web chat, and outdated call center software) to deliver and manage their services. Moreover, there's no consistency, standardization,

or quality control in how these services are being provided. Stacy realizes that the best way to solve all of these challenges is to implement CSM. The platform will centralize and unify the work of her entire student success team, improving the quality and delivery of student services—and also helping the team to learn to view itself as an interconnected team providing interdependent services. How does Stacy go about implementing CSM to ensure the highest-quality services possible are being delivered across her organization?

Transformational leaders like Stacy should be applauded for prioritizing unification of all of an organization's service representatives and workflows. Although this work is critical, it's a task that confounds many organizations. An estimated **50% of all large organizations have tried and failed thus far to unify their engagement channels**, according to 2021 Gartner research—a shortcoming that can be incredibly consequential for the organization's long-term customer engagement goals. The reality is that unifying and connecting service teams within a higher education institution requires a significant, sustained commitment to organizational change. And this unification process is getting tougher all the time. With the explosion of new channels and workflows for providing services to customers—everything from social media to self-service web portals—higher education institutions are prone to their customer service functions operating in disconnected, low-visibility siloes. Not only is it difficult to impose consistency and quality control in this environment, but these services do not readily scale when the institution experiences sudden surges in demand, such as at the start of a new semester or during enrollment growth.

CSM is optimally positioned to help educational institutions solve these challenges by unifying traditionally siloed customer-service functions, enabling representatives to better coordinate, plan, and share knowledge. Let's explore four essential strategies for higher education institutions working to provide services efficiently, reliably, and to exacting quality standards:

50%

of all large organizations have tried and **failed to unify their engagement channels**

GARTNER RESEARCH

01. Log every customer interaction in a single database:

Higher education institutions interact all day with students, parents, alumni, and other customers. Sometimes these interactions get logged, and sometimes other teams and departments have access to records of these interactions. But more often than not, an institution's customers find themselves navigating a confusing bureaucracy, where they are constantly getting the runaround, their inquiries aren't being resolved in a timely manner, and they are forced to constantly re-explain their issue or question to everyone they interact with. Moreover, one department doesn't know what another has done for the customer, nor does one service representative have a way of retrieving records from another department. CSM creates an opportunity for all of these interactions to be logged in a **central database**, and it's critical that higher education institutions take advantage of this opportunity. Although every institution will need to overcome institutional resistance to centralizing data, as well as associated privacy and security concerns, these obstacles and challenges are well-worth overcoming.

02. Create universal evaluation metrics for all channels:

Like many established businesses, the services provided by educational institutions tend to evolve organically over time. Perhaps the marketing department creates a social media team, which then becomes de-facto responsible for fielding inquiries from students. Perhaps a new IT ticketing system is implemented that gives students access to a new web portal for self-submitting service requests. In all of these instances, institutions often fail to fully integrate these channels with existing service channels. Thus, the teams that provide services through these channels are not held accountable in the same way that their counterparts on other channels are. Thus, it's important to work toward **integrating all channels** through which services are provided in a way that ensures all of the teams that provide services are being evaluated in a consistent manner. For example, if the marketing team is providing customer service to prospective students via social media, this team should be held to the same performance standards and metrics as when the recruitment team's contact center staff fields the same types of service issues. Aligning all service channels across the organization is challenging, but it's the only way to ensure experiences are consistent across channels and, moreover, it's the only way for all teams that provide the same service across the institution to be judged fairly on their performance.

03. Use presence indicators to efficiently access expert help:

Educational institutions should strive to provide first-contact resolution for every service inquiry. However, as institutions become more complex and offer more services, and as teams become more specialized and siloed, it becomes increasingly difficult for an individual service representative who works on a single team to resolve every customer issue on their own—and also to find and connect with an expert who will have answers. CSM offers presence indicators to help representatives find experts who are available right now to resolve a customer inquiry, without leaving the customer hanging. With presence indicators, any representative can **pinpoint exactly which subject-matter experts are available** at any given time, and work in real time with that expert to get every issue resolved for a customer. In many instances, the original representative can resolve issues for customers on the spot, without even having to pass them off to someone else.

04. Foster cross-channel proficiency among employees:

Service representatives in higher education tend to work on customer issues within one channel only. They answer phones, or they respond to questions on social media, or they work on IT tickets. They develop their own workflows, and they become highly proficient. But they don't interact with colleagues who work on similar issues across other channels.

The best way to ensure more connectivity, visibility, and quality control is to foster cross-channel proficiency among service representatives. Representatives who understand how their jobs intersect with the work of others can coordinate better, ensuring they—and not their supervisors—can work toward addressing gaps and quality-control issues that the organization is facing with omnichannel delivery. More connected, coordinated representatives also will become more knowledgeable and engaged in their jobs, and more able to deliver higher-quality services faster.

Final Thoughts

As higher education institutions unify the delivery of services across various channels, they will identify opportunities to use existing resources more effectively, which will reduce costs while improving quality. To create omnichannel consistency, institutions should ensure that every interaction gets logged into a single centralized database, evaluate performance of service professionals the same way across all channels, take advantage of presence indicators to access expert help, and create an environment where cross-channel proficiency for an individual service representative becomes possible and encouraged.

PILLAR 7:

Innovating to maintain and strengthen customer satisfaction

Meet Mary

Mary is the newly installed senior vice president for technological innovation at a nationally ranked research university. Mary's predecessor was a strong day-to-day manager who successfully shepherded multiple technology initiatives to completion, but he wasn't a visionary who could see at a big-picture level what technology symbolizes to the university. In fact, he never fully grasped that the quality of every technology initiative is a direct reflection of the university's overall reputation as an innovator and trailblazer. Thus, his projects were never transformative; they essentially just enabled the university to keep up with the rapid pace of technological innovation—but never helped position the university as a national technology leader.

His rollout of CSM was a prime example of his limitations. When Mary looks objectively at CSM, she sees that the rollout went smoothly and that adoption rates were high. But CSM didn't result in the institution-wide digital transformation that Mary knows is possible with CSM. For example, Mary

observes that various service departments aren't really using analytics and intelligence from CSM to optimize how they deliver and manage services. She also observes that no senior administrator has ever held up CSM as a shining example of the university's technological prowess. To the contrary, it's well-known to senior administration that CSM failed to get the return on investment that Mary's predecessor promised. Mary wants to turn around this ship and deliver on the full potential and promise of CSM. She envisions CSM providing specific insights into how university services are shaping student perceptions of the value of their education, and pinpointing specifically where services are being delivered so inadequately that they're actually impeding students' ability to receive the educational support they need. As Mary examines how to improve CSM, what priorities should she make front and center to ensure CSM becomes a technology home run for her university?

26%

of higher education leaders describe their approach to technological innovation as **planned and centralized**

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LEARNING HOUSE STUDY

The sorts of challenges faced by academic innovators like Mary are commonplace in higher education, where bureaucracy and resistance to change tend to stifle even the best-laid plans. Just **26% of higher education leaders describe their institution's approach to technological innovation as planned and centralized**, according to a 2018 Learning House study. The reality is that innovation tends to be haphazard, pigeonholed, and uncoordinated in educational institutions. Often, there's simply too much bureaucracy and resistance for technology leaders to overcome. As a result, technology projects tend to not result in the types of wholesale transformation that are necessary for educational institutions to stand apart from their peers. CSM absolutely should not become a mediocre technology win. Although it takes foresight, planning, and commitment, it is possible to use CSM to **drive continuous improvements to the delivery and management of services.** Let's explore five essential strategies for thinking big and boldly as a technology innovator to exceed customer expectations and ultimately hit a CSM innovation home run:

01. Invest in areas where your customers are, not where you are:

Services in higher education are typically delivered via a top-down approach, with the institution unilaterally deciding when, where, and how services get delivered to the community. As a result, decision-makers don't necessarily keep their finger on the pulse of how end users actually prefer services to be delivered. If an institution is only offering phone or in-person service during normal business hours, for example, that's an antiquated, customer-unfriendly practice—even if it is a convenient option for the team providing the service. The customer-friendly option is to deliver that same service through the channels that the institution's customers prefer. For example, instead of phone support only, the institution could build out a web portal that enables customers to access information on their own, and/or could offer an asynchronous text messaging option for communicating with the service team. The key is to listen and solicit feedback from end users, and then to make investments accordingly—instead of just retaining the same service investments year after year because "that's how it's always been done."

02. Use the Internet of Things to continually generate more valuable insights:

The Internet of Things (IoT) has enabled more devices to be connected more often. What this means is that devices everywhere—smartphones, tablets, smart speakers, cloud-connected equipment and machinery—are capable of transmitting valuable, real-time data on how and when services are being consumed, as well as when services will be needed or are recommended. Higher education institutions can use this treasure trove of data to not only better understand their customers' habits around consumption and use of services, but also to figure out how to better prepare and plan to optimize these services. For example, IoT lets organizations build remote diagnostic capabilities directly into their products, so the organization can get ahead of known outages and proactively alert affected users—even before users realize what the problem is and request service for this issue. Similarly, IoT can alert an organization when a critical mass of its customers is failing to use or consume a product correctly—giving the organization valuable lead time to **diagnose and remedy the issue before these customers all require service.**
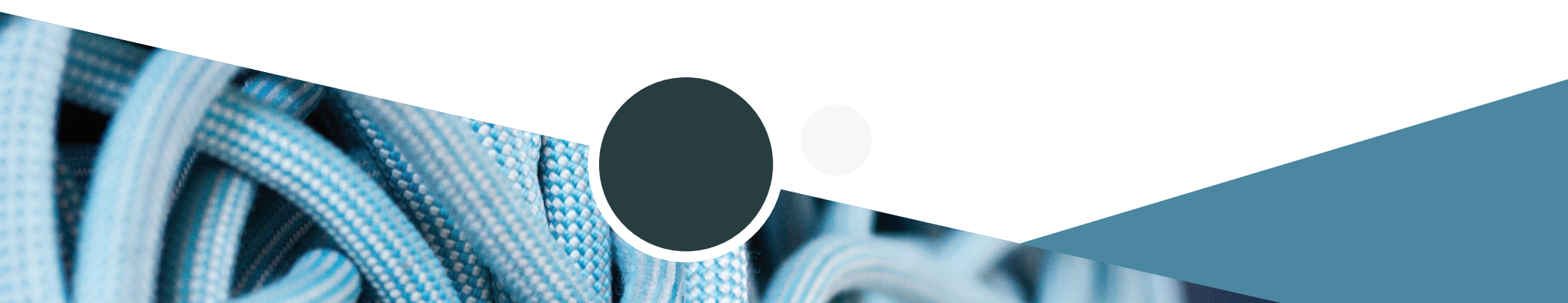
03. Make more services self-service:

Higher education institutions have traditionally prided themselves on the quality of their personalized, tailored services. But tech-savvy customers, particularly students, don't prefer these traditional service delivery models. Generations that have grown up googling all of their questions and turning to phone apps to manage their lives instinctively want to be more self-reliant. Thus, higher education institutions should be developing services that don't require contact with service teams at all—knowledge articles, Q&A-style community forums, and dialogue boxes embedded within products and services to provide helpful hints and troubleshooting prompts. Although educational institutions may feel that these self-service options are going to detract from perceptions of quality and personalization, the customers don't see it that way. Moreover, the development of these next-generation services is itself a win, with a unique opportunity to provide services that are just as intuitive, comprehensive, and helpful as any in-person service would be. For example, the institution needs to be thinking about how to optimally organize, index, and interlink information and resources, and should be turning to SEO optimization principles and perhaps even app developers to design robust self-help resources.

04. Enable your customers to share their service experiences publicly:

Higher education institutions cannot run from third-party review sites, so why not embrace them? Allowing students, faculty, and others to officially review the quality of their service experiences can actually be a strategically important way to help promote the existence and quality of services. For example, a career center might invite every student who receives service to leave a review on the career center's website, or perhaps on the career center's official social media accounts. Inviting participation in this manner will inevitably lead to some negative reviews, but modern consumers understand that no institution and no service is perfect 100% of the time. Institutions also have the ability to respond directly to any individual negative review, such as offering an apology for unusually poor service, or an explanation that puts a bad review into proper context. While institutions do not have total control over the messaging and content, modern consumers expect to have access to honest reviews—and the institution can use negative reviews to drive continuous improvement in quality and delivery of services.
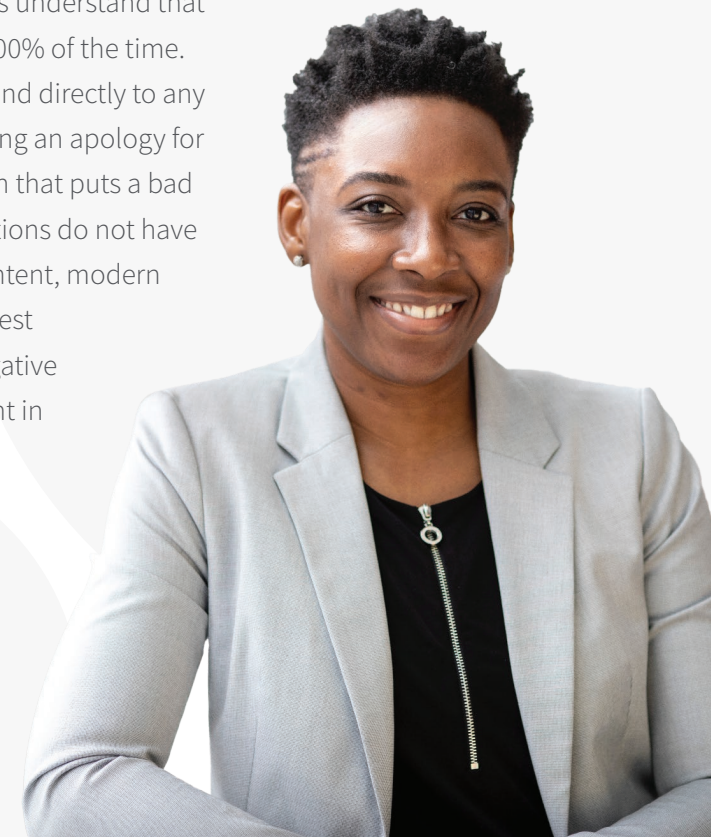
05. Introduce new learning and service experiences:

When an educational institution decides to implement CSM, the question is not what are the limitations of the system, but rather what are the limitations of the institution. CSM is endlessly customizable to an endless range of teams that provide services. No CSM implementation can possibly achieve all things to an institution—and certainly not all at once. With a successful Phase 1 launch, an institution becomes ideally positioned to expand the types of services that can be delivered and managed through CSM. As more and more of these service teams see the benefits of CSM— its analytical capabilities and the actionable insights it generates—these service teams will start asking how they can get CSM. Thus, future CSM wins are often built on the backs of existing wins. Educational institutions especially should never be resting on their laurels and accepting the status quo; just as higher education is itself an enriching journey of learning and discovery, so too can CSM be the conduit through which institutions continually expand and refine the quality and reach of their services.
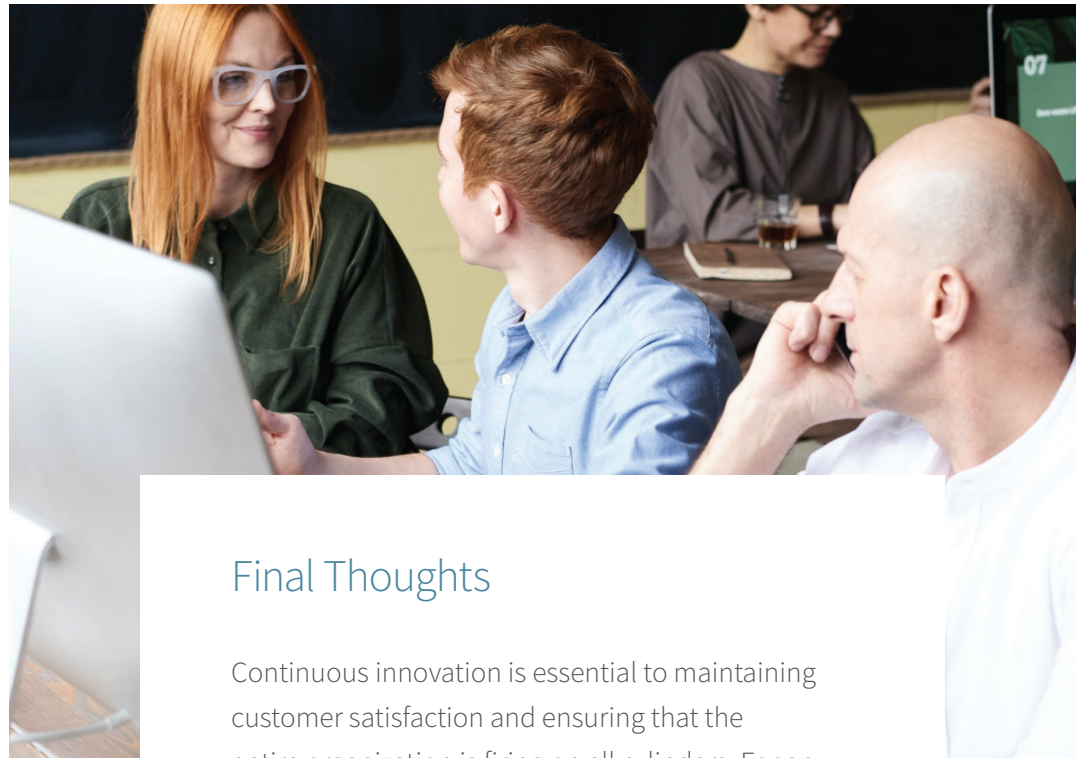
Final Thoughts

Continuous innovation is essential to maintaining customer satisfaction and ensuring that the entire organization is firing on all cylinders. For an educational institution to be thinking and acting boldly, it's important to always be delivering services in the ways your customers want, turning to the Internet of Things to generate continuous new insights, increasing self-service options whenever possible, empowering customers to share their service experiences publicly, and expanding CSM over time to incorporate even more types of services.

Final Thoughts

Higher education institutions are places of learning and enlightenment—where brilliant ideas are born every day, and where innovation and creativity are not just celebrated, but mandatory. That makes the bar high for CSM.

> Don't let CSM become just another technology implementation that does its job but fails to inspire.

Transformational CSM wins can—and deserve to—be on the same playing field as an endowed faculty chair, or a student Fulbright scholarship, or a MacArthur Genius Grant. After all, the optimal delivery and management of services in higher education is a keystone accomplishment—one that makes possible every other win and every other recognition bestowed upon the institution.

It's also important for institutions not to drag their feet on CSM. Whether higher education is ready or not, every member of every educational community is increasingly expecting more from their institution's services—more options and channels for getting support, more intelligence and AI built into service delivery, faster speed to resolution. **To deliver and manage services at the quality, pace, and scale that these diverse customers demand, higher education institutions need**

the enhanced analytical capabilities and coordination that only CSM can provide.

That's why this book shouldn't just sit on your computer desktop, forgotten amid other competing priorities. Digest and internalize the many specific tips and advice Crossfuze's digital transformation experts have developed based on years of on-the-ground experience. Use Crossfuze's experience and insights in the CSM implementation arena to propel your organization forward in this strategically important area.

Finally, as you plan out your CSM implementation journey, remember that you don't need to go it alone. If this book has helped you appreciate how many moving parts and priorities and considerations you must juggle, reach out to Crossfuze. We'd be honored and delighted to partner with you on this journey, helping your organization achieve the CSM digital transformation you desire and deserve.

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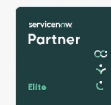
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