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# CSM for CMS

ServiceNow and Ventech

Ventech  
Solutions





## Agenda

Introductions

Customer Service Management Overview

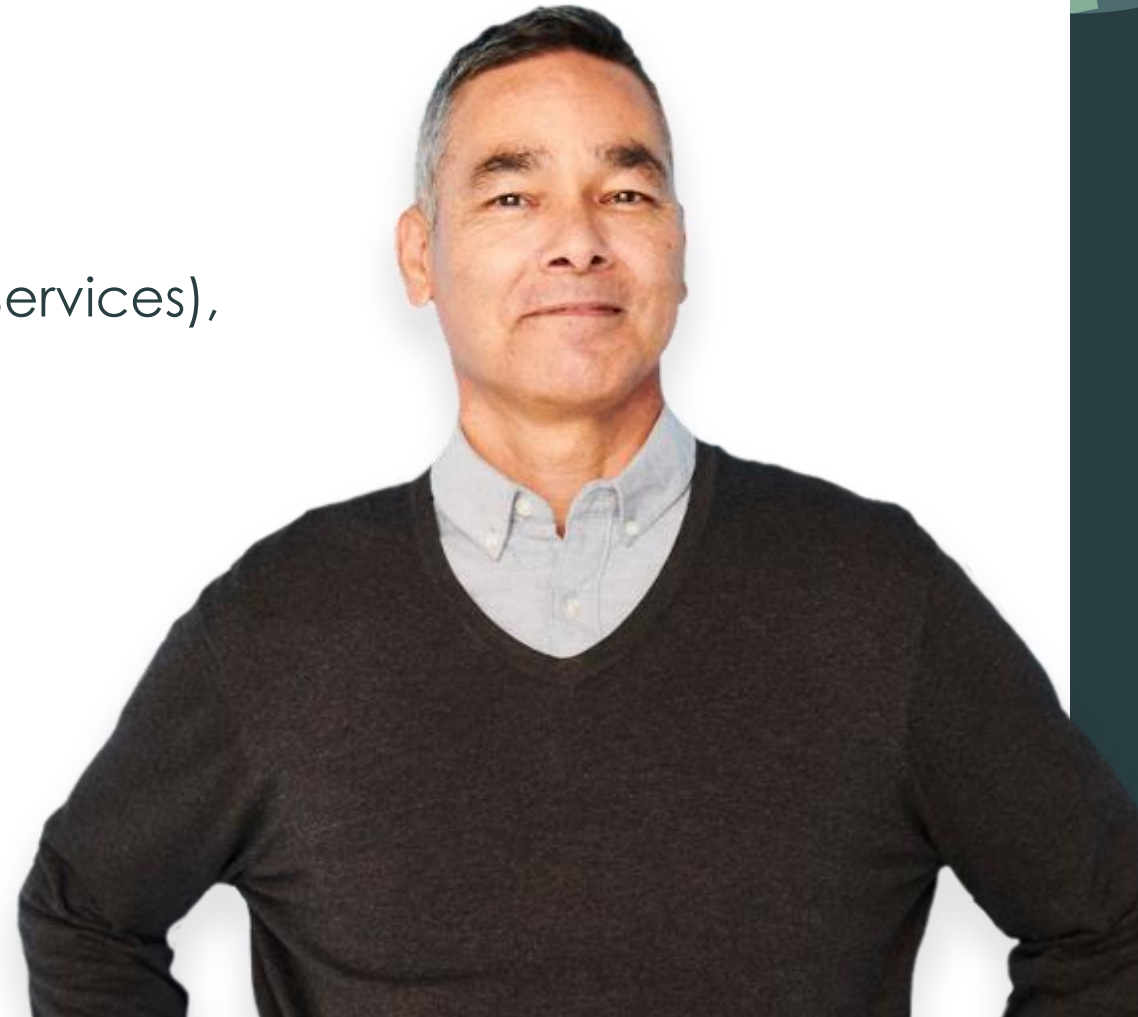
Customer—CMS (Centers for Medicare/Medicaid Services),  
CCSQ (Center for Clinical Standards and Quality)

- 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

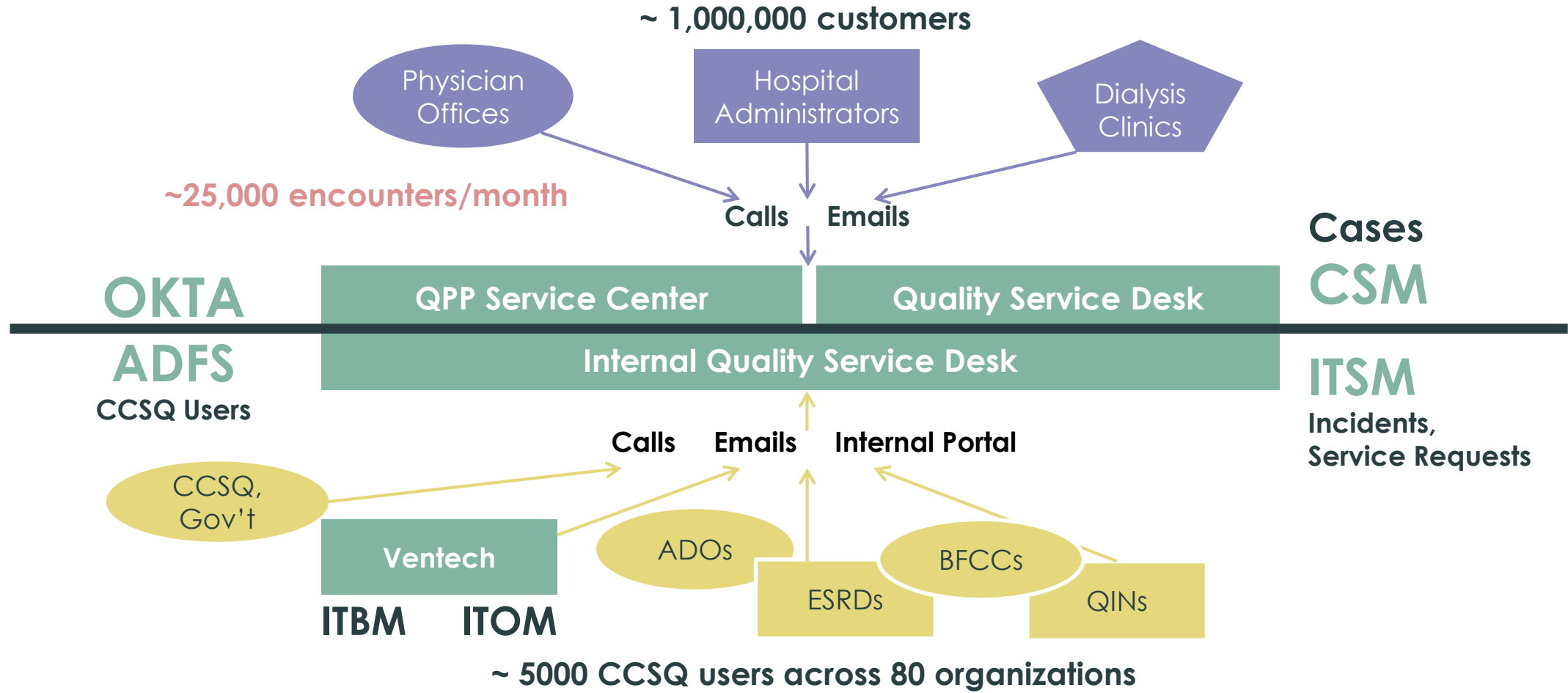
- New program (Incentive program) inside CCSQ—2016
- Existing Remedy solution was not an option
  - New solution required
- First adopter of ServiceNow inside CCSQ
  - ITSM Incident—July 2016
  - Implemented—October 2016
- November 2016—The ServiceNow Customer Service Management (CSM) was purchased
-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

## Enterprise needs—CMS, CCSQ

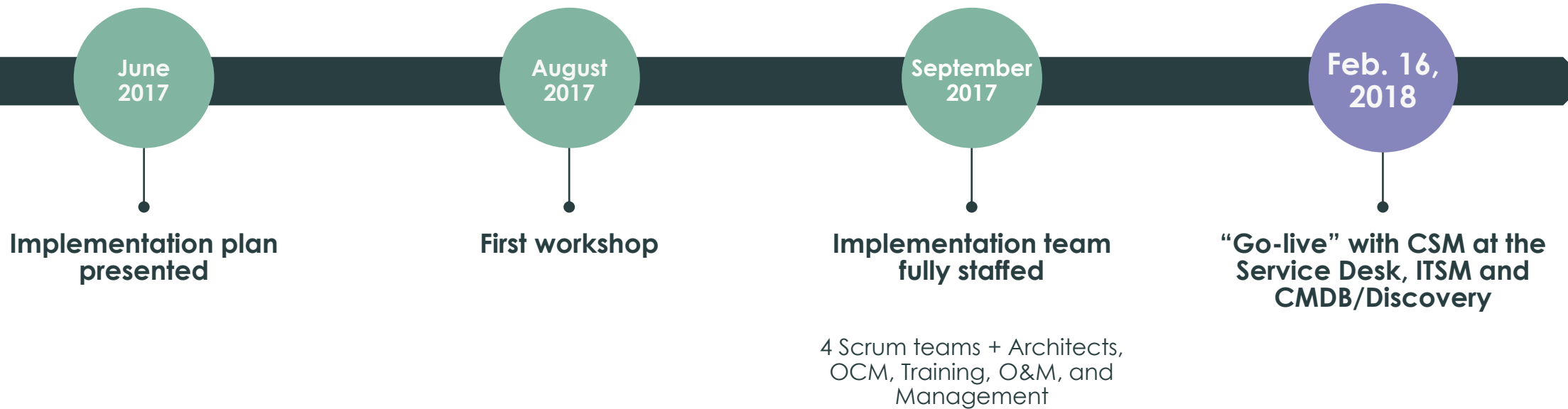
Enterprise: The rest of CCSQ (Healthcare Quality Information System, HCQIS)

- 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

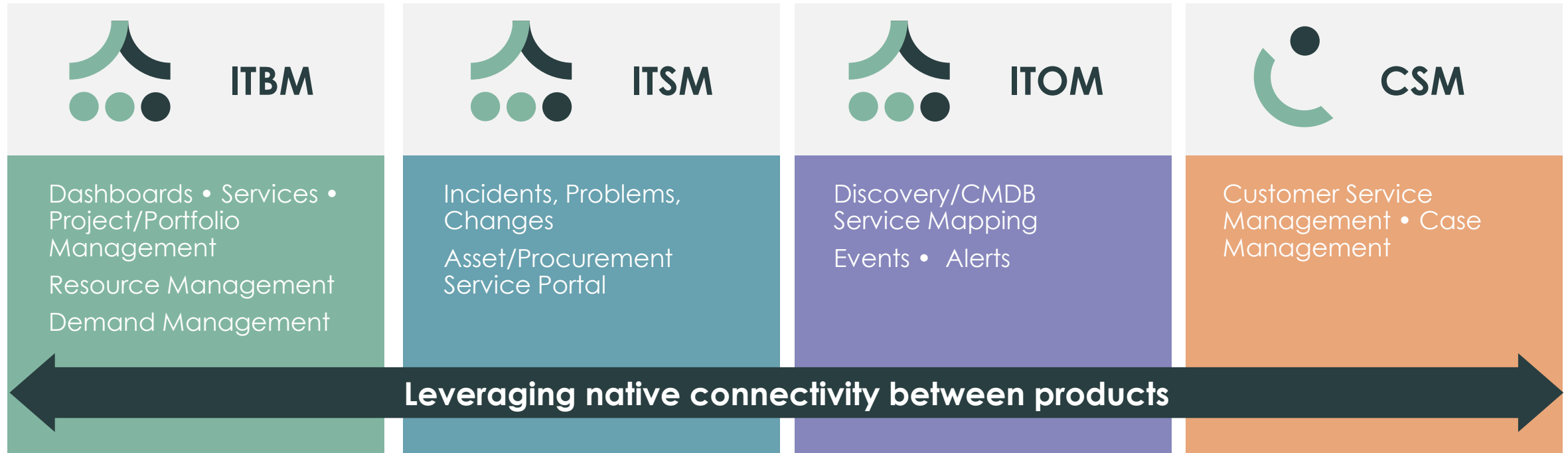
- Substantially improved performance metrics
  - **15 second** average speed to answer
  - **>90%** customer satisfaction
  - **>80%** first call resolution
- Scalable to integrate additional Help Desks and Service Centers
- Dynamically configurable to respond to call volume surge at the Service Desk 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

Today

45 people and growing

Center of Excellence  
established for cross-  
Ventech support and BD

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

- **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



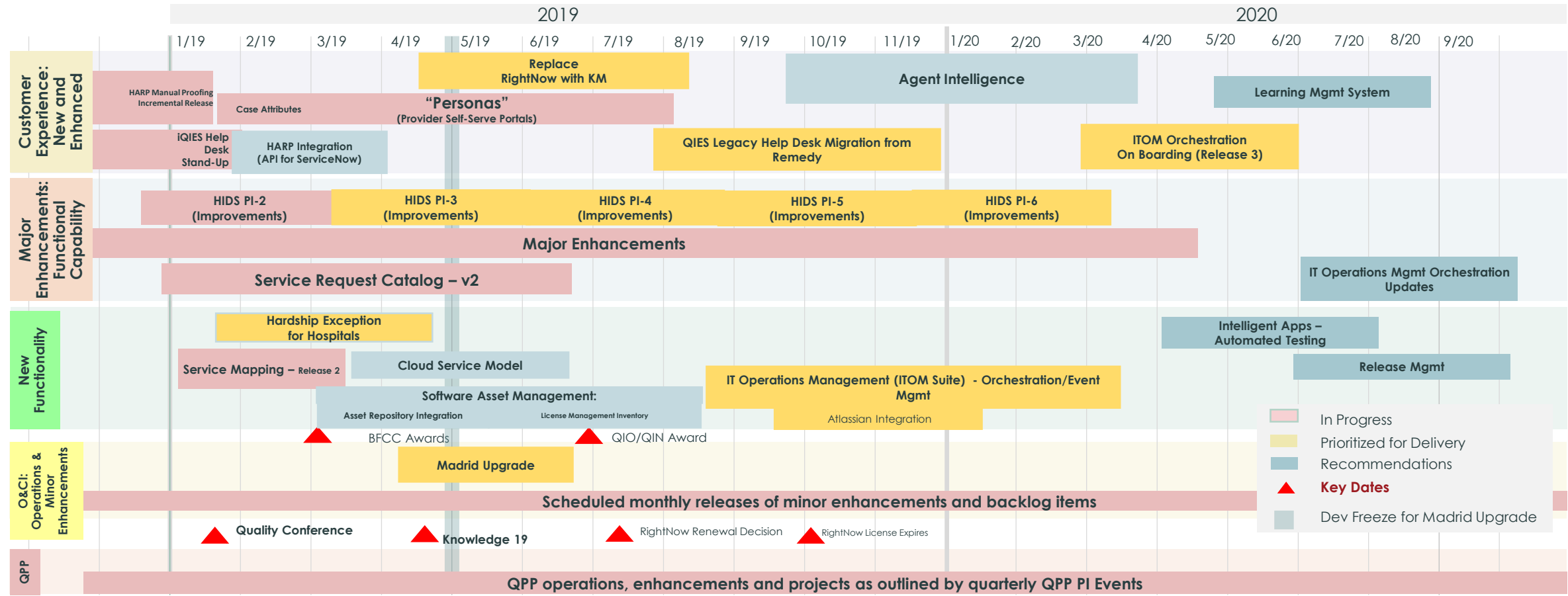


## What's next for CCSQ?

- 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



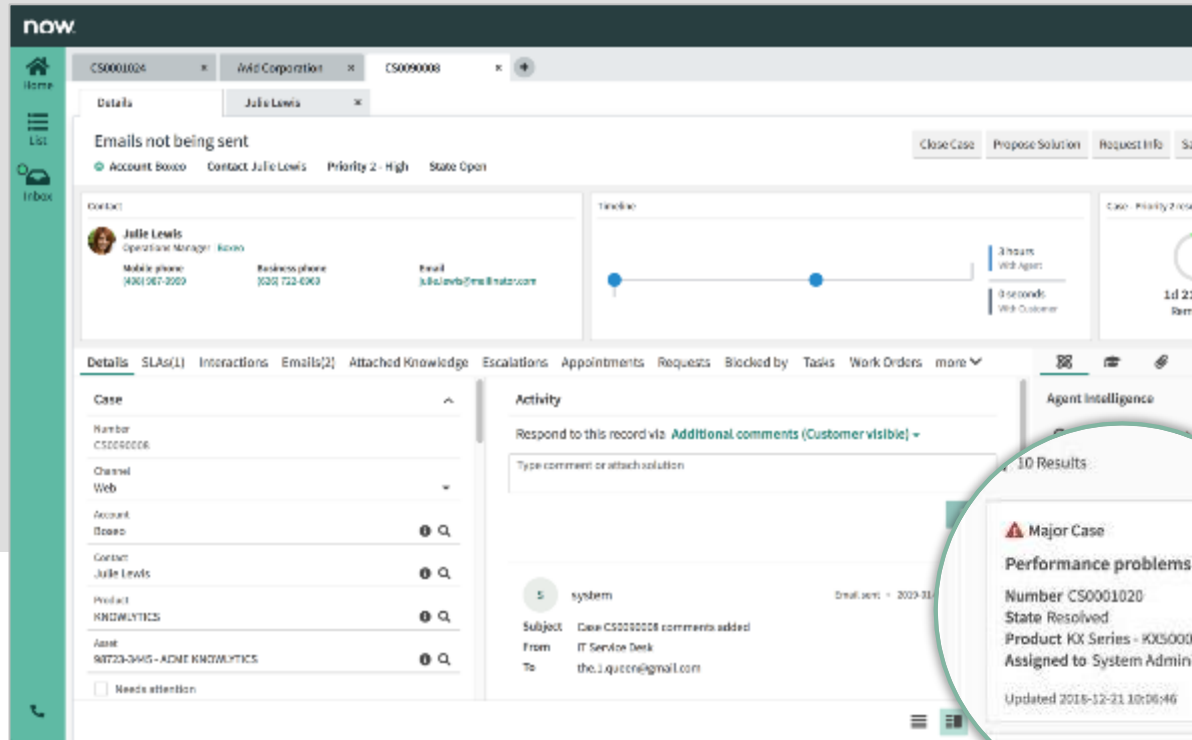
**knows how to get it done!**

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# What's new in Madrid with Customer Service Management





### CUSTOMER SERVICE MANAGEMENT

## Agent Workspace

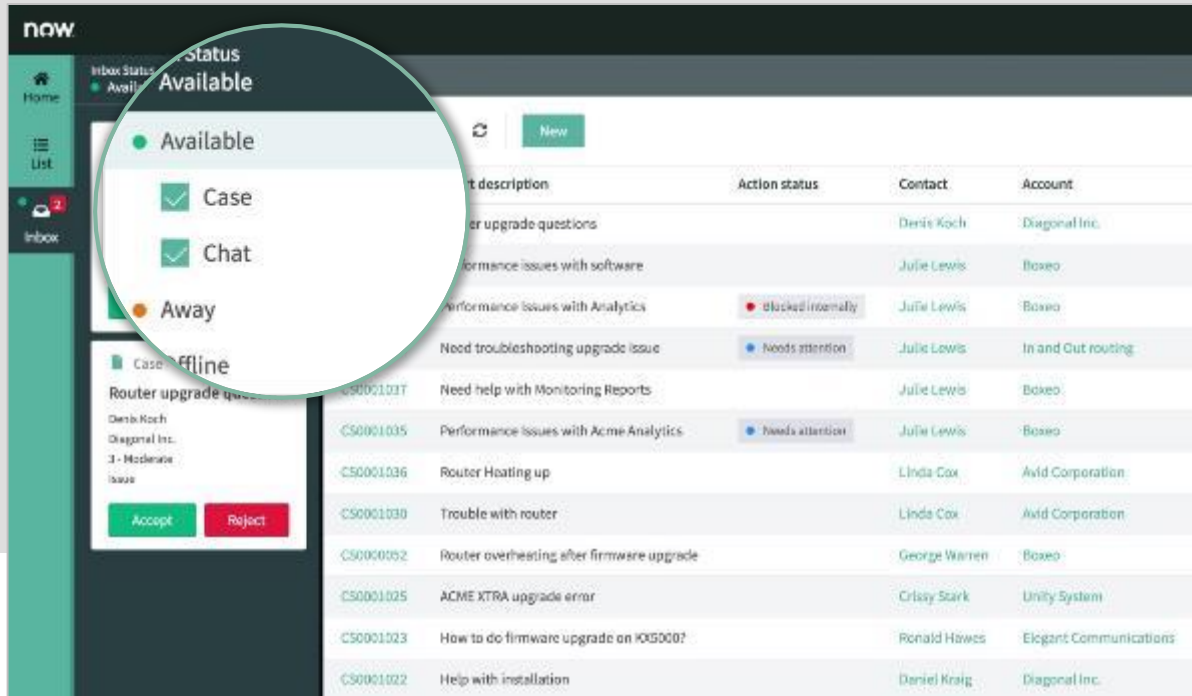
Improve agent and customer experience with optimized workspace layout

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.



### 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

Member	Short description	Consumer	Channel	Status	Priority	Assigned to
C5000323	Router created during...		Web	Open	High	John Jason
C5000327	Router firmware updat...	Probing Consol...	Web	Resolved	Low	John Jason
C5000371	Router Access/performa...	Probing Consol...	Web	Open	High	John Jason
C5000370	Router performance issue...	Probing Consol...	Web	Open	High	John Jason
C5000325	Router with PoE channel...	Agent Connect Ho...	Web	New	High	John Jason
C5000321	Router Recovery	Advanced Supp...	Web	New	High	John Jason
C5000371	Router with...	Web	Resolved	Low	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**

Lookup:  
George Warren

**George Warren**

Account: 60000  
Email: gwarren@federal...  
Mobile phone: 1-308-937-7357  
State: Providence, RI

**Agent Intelligence**

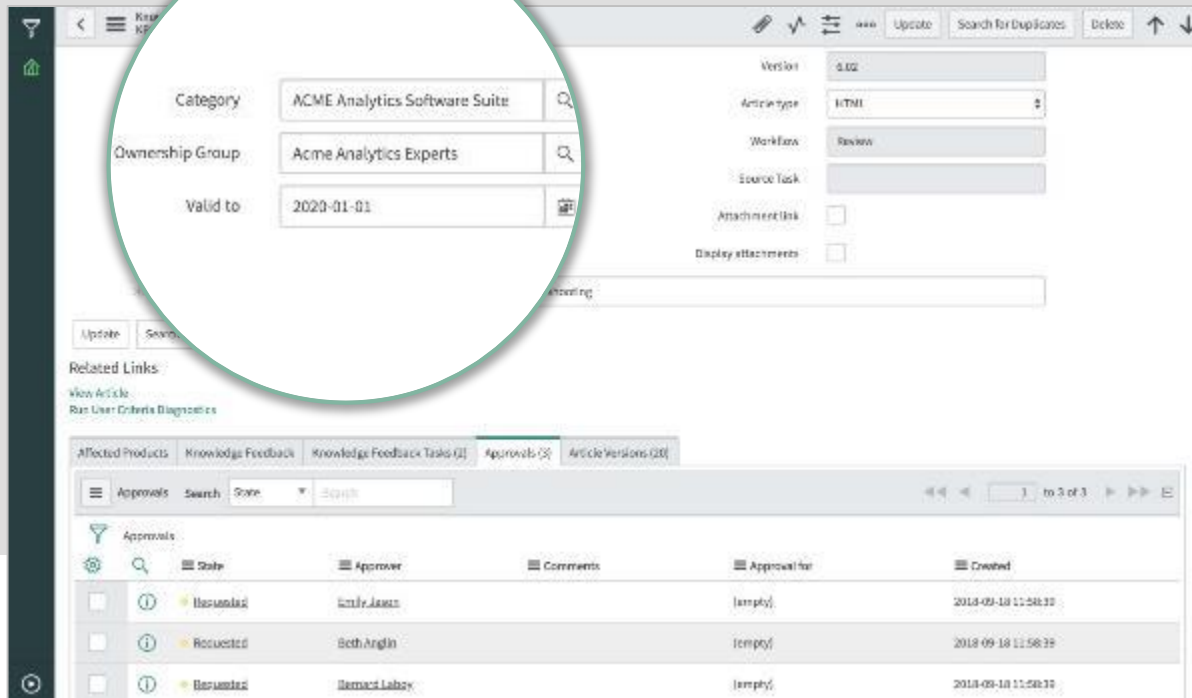
Router keeps dropping connection

1 Result (Filtered)

**Case**

Router performance issue after so...

Number: C5000370  
Product: RX Series - RX5000  
Assigned to: John Jason



CUSTOMER SERVICE MANAGEMENT • KNOWLEDGE MANAGEMENT

## Group Ownership

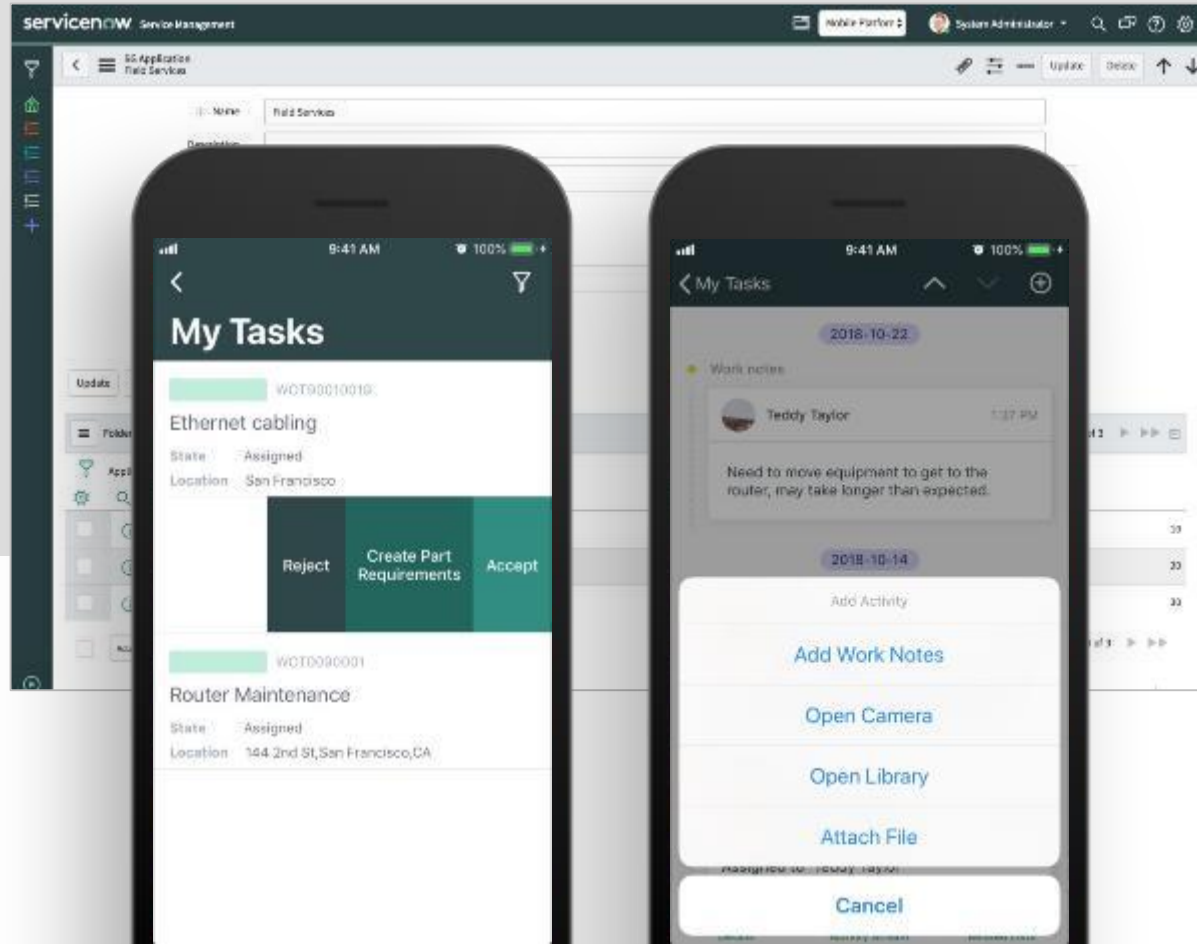
Improve article quality and response time with team content management

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

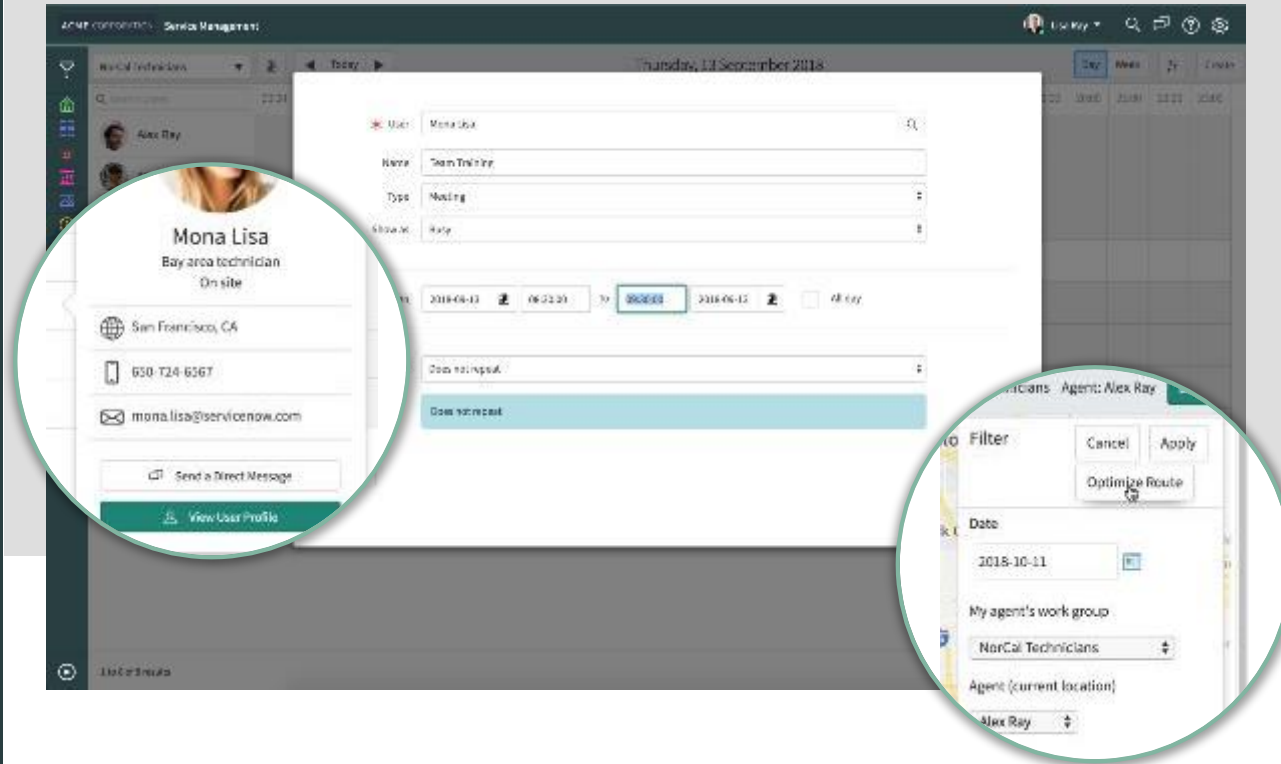
Boost technical productivity

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

Integrate maps, geo-location tracking, and swipe actions

Enable offline read/write when disconnected

# Questions?

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# Thank you

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