Xanadu Account Lifecycle Events

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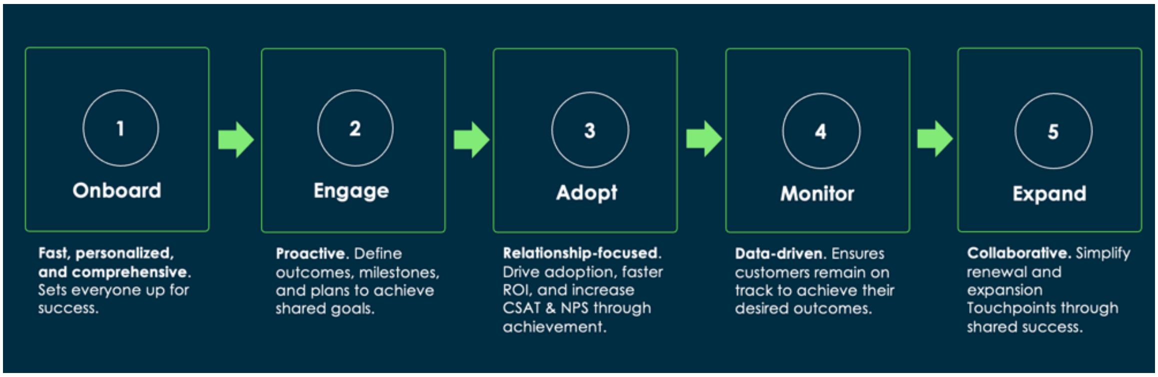
Table of Contents

Account Lifecycle Events

The ServiceNow® Account Lifecycle Events application enables technology industry providers to create a structured onboarding experience, define and track objectives, outcomes, milestones, and plans to achieve shared goals.

The following diagram shows the different tasks involved in the Account Lifecycle Events life-cycle.



Account Lifecycle Events features include the following:

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

Get started

Account onboarding

Define a structured, repeatable, onboarding experience with the preconfigured playbook.

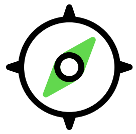
Customer success

Track success objectives, outcomes, help mitigate risks, and identify opportunities for expansion and renewal.

Account onboarding

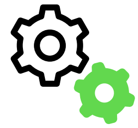
Create a structured onboarding experience while enabling collaboration and transparency with internal and external stakeholders during the onboarding process.

Explore



Learn about the account onboarding playbook and its key features.

Configure



Set up and configure the Account Onboarding playbook.

Use

Use the playbook to onboard customers

Reference

Get information about the data model and installed components

Exploring account onboarding

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

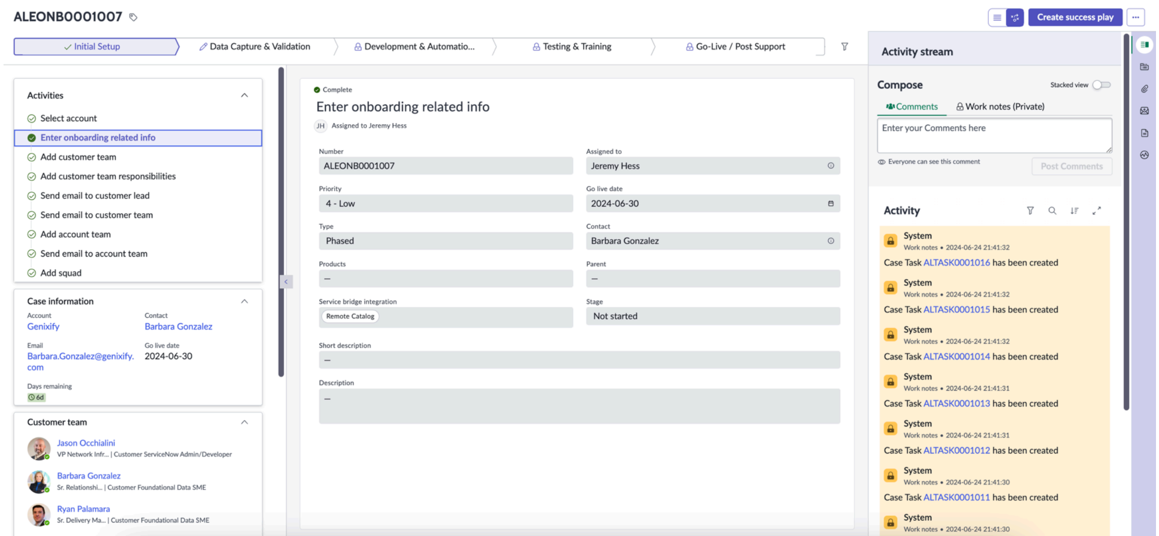
The account onboarding solution includes a playbook, a dedicated onboarding case type, and defined case tasks that support this important process. You can use the playbook as a template or as a starting hover over build your onboarding experience.

Account onboarding includes the following:

- Playbook: A playbook that serves as a starting point to build a repeatable onboarding process that meets business requirements.
- Onboarding cases: A central record for the onboarding team including dedicated tasks to assign work, automate, and capture data.
- Case tasks: Case tasks that can be used by internal and external stakeholders to track actions, next steps, and risks needed for the onboarding workflow to be completed.
- Data import: Import, manage, and publish data gathered from internal and external stakeholders.

Account onboarding playbook

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



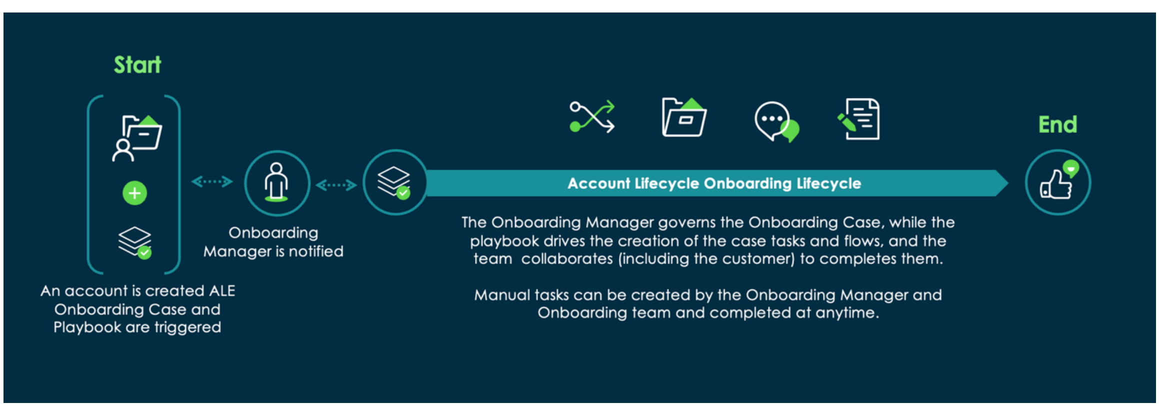
The playbook visualizes a workflow in a simple, task-oriented view. The workflow for the account onboarding playbook is created using the Process Automation Designer and can be configured based on your requirements. See Configure the account onboarding playbook using Process Automation Designer for details.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

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

Account onboarding workflow

The account onboarding workflow involves the following stages:

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



Configuring account onboarding

Set up and configure the Account Lifecycle Events application.

This section covers the following:

- Create an account onboarding case
- Activate Account Lifecycle Events
- Set up the account onboarding playbook
- Configure the account onboarding playbook using Process Automation Designer
- Set up Recommended Actions for account onboarding
- Run scheduled job to back up staging table

Activate Account Lifecycle Events

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

Before you begin

Role required: sn_customerservice.customer_admin

About this task

The Account Lifecycle Events plugin activates these related plugins, if they aren't already active.

Plugins for Account Lifecycle Events

Plugin	Description
Technology core [com.sn_ti_core]	Technology industry vertical Customer Service Management extensions.
Customer Service [com.sn_customerservice]	Automate your processes and give service agents visibility into the customer systems and tools that they require to deliver proactive services to your customers.
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.
Playbook Experience Core [com.glide.playbook_experience.config]	Enables you to customize the default Playbook user experience to create your desired business process workflow.
Playbooks for Customer Service Management [com.sn_csm_playbook]	Guides customer service agents through the various tasks to resolve customer issues, and visualizes the entire lifecycle across diverse and siloed processes.
Customer Service Case Types [com.snc.csm_case_types]	Activating this plugin enables the system administrator to create and manage case types.
Record Related Items Connected [com.snc.sn_record_related_items_connected]	Enables record related items.
Guided Decisions Experience [com.snc.guided_decisions_playbook_experience]	Enables activity types, definitions, and UI components for the display of guided decisions in a playbook on Workspace.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.
   You can search for the plugin by its name or ID. If you can't find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install**, and then in the Activate Plugin dialog box, select **Activate**.

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

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

   .

Set up the account onboarding playbook

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

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

An account onboarding case is created in two ways:

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

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

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

The Account Lifecycle Events playbook includes the following stages and activities that can be used in the account onboarding process.

- Initial setup
- Data capture and validation
- Development and automation
- Testing and training
- Go-live and post support

Create an account onboarding case

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

Before you begin
Role required: sn_acct_lc.agent

Procedure

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

Initial setup

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

Activity	Details
Select account	When you select the customer account, a new account onboarding case is generated. **Note:** If the account onboarding case was generated from a case, this field is auto populated. Click **Continue** to go to the next activity.

Enter onboarding related info	The next activity in the playbook involves gathering onboarding related information. The mandatory fields to be entered are:
	• Assigned to: Select the provider agent who is working on this case.
	• Service Exchange integration: Select one of the following options:
	  ◦ Not required: No Service Exchange integration is required.
	  ◦ Remote catalog: A Service Exchange integration for the remote catalog feature is required.
	  ◦ Remote task: A Service Exchange integration for the remote task feature is required.
	  ◦ Foundation data sync: A Service Exchange integration for the foundation data sync feature is required.
	• Type: Select one of the following:
	  ◦ Phased: A specific part of the onboarding process for this customer is managed through this Account Lifecycle Events onboarding case.
	  ◦ Full: The entire onboarding process for this customer is by this Account Lifecycle Events onboarding case.
	• Specify the Go live date and select **Mark complete** to proceed with the next activity.

Activity	Details
	Note: The State field is set to **New** for a new record. If this field is updated, the Stage field is automatically updated based on the predefined mapping. This mapping is also available for account onboarding case tasks between the Progress and State fields. See Field mapping for account onboarding cases and case tasks for details.
Add customer team	Add the customer contacts who will work on the account onboarding case. • Enter the First name, Last name, Email address and click **Add** to create a new customer contact. • Select **Mark complete** to move to the next step.
Add customer team responsibilities	Assign responsibilities to each of the customer contacts that have been added. • Select the Contact you've added in the previous step. • In the Responsibility field, select one of the predefined user roles and click **Add** to assign responsibility for the customer contact. • Click **Mark complete** to move to the next step. When this step is completed, two emails are automatically generated. The first email identifies the primary point of contact for the account onboarding case. The second email identifies the key team members participating in the onboarding process. **Note:** Users with the following responsibilities must be explicitly granted specific roles by the administrator: • Customer onboarding point of contact: Users with this responsibility must be granted the `sn_customerservice.customer_admin` role. • Key team members: Users who have key team member responsibilities must be granted the `sn_customerservice.customer_case_manager` role.
Add account team	Add and assign responsibilities to the internal team members (service providers) working on the account onboarding case. This includes the ServiceNow administrator handling the case. After the account is added, an email is sent to all the team members.

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

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

Field mapping for account onboarding cases and case tasks

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

Account onboarding case mapping between State and Stage fields

State	Default stage	Available stages
New	Not started	• Not started • At risk
Unassigned	Not started	• Not started • At risk
Active	On track	• On track • At risk
Blocked	Paused	• Paused • At risk
Closed		Finished
Canceled		Finished

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

Account onboarding case task mapping between State and Progress fields

State	Default value	Available options
Open		Not started
Awaiting customer	Paused	• Paused • At risk
Awaiting internal	Paused	• Paused • At risk
In Progress	On track	• On track • At risk
Review	On track	• On track • At risk
Closed		Finished
Canceled		Finished

If you are using an earlier version of the Account Lifecycle Events application, follow the instructions in KB1651427 to correct the mapping between these fields.

Data capture and validation

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

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

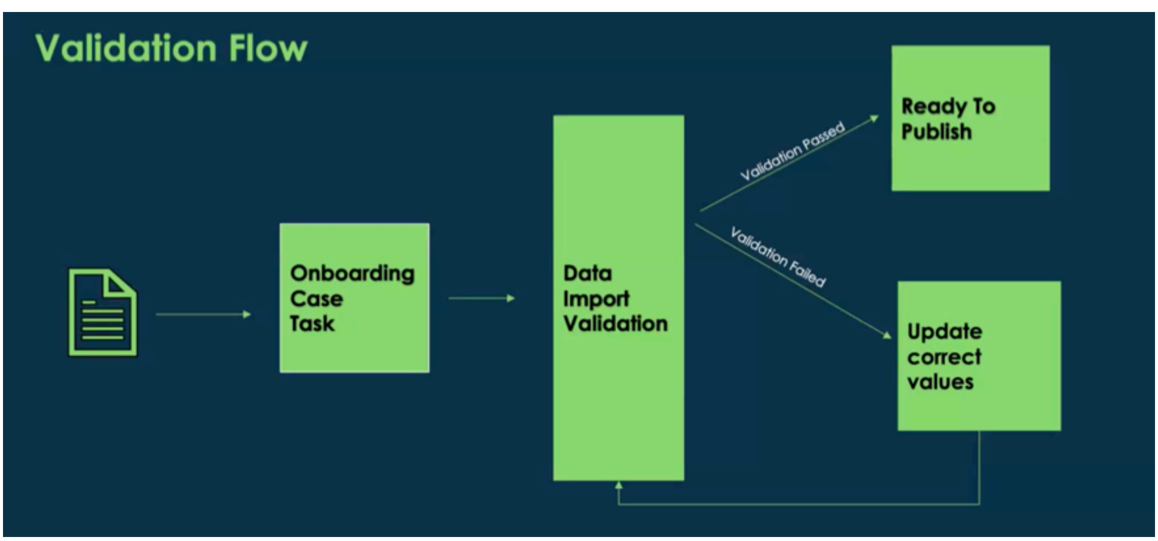
Stage	Activity
	• Customer contacts • Location • Service entitlement • Install base item • Account address relationship • Contract • Sold products • Install base M2M sold products Custom conditions have been defined and field values in these tables like source table, target table, and data source are auto populated in each of these tables. You can use these flows by directly importing data into these tables and publish them when they're ready. For details on importing data into these tables, see Import data into the account onboarding playbook. These tables have been configured with specific conditions and field values have been auto populated. You can modify these tables, add new tables, and activities depending on your requirements using the Process Automation Designer. See Configure data validation using the Data Validation Assist table for details.

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

Account onboarding data validation flow

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

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



The data import flow involves the following steps:

1. The customer uploads an Excel file as an attachment to the account onboarding data import task.
2. The data is loaded to the staging table and validated to ensure that only the correct data can be published and moved to the target table. Several pre-defined validations are available with the base system. You can create additional validations or use a custom script if required. See Configure data validation using the Data Validation Assist table for details.
3. When the validation has been completed, the data is moved to one of the following categories:
4. - Ready to publish: The data meets all the validation conditions and can be published.
   - Needs attention: Review the records that are in the **Needs attention** state, resolve the errors, and select **Save**. These updated records are moved into the **Yet to validate** state.

Configure data validation using the Data Validation Assist table

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

Before you begin

Role required: admin

About this task

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

Procedure

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

```
(function executeCondition( /* glide record */ stagingTableGr)
 {
    var obj = {
        validationPassed: true,
        message: ''
    }; /*      validationPassed : return true if validation
 passed else return false      message : populate error message
 if validationPassed is false else return empty string     */
    if (global.JSUtil.notNil(stagingTableGr.task) &&
 global.JSUtil.notNil(stagingTableGr.u_company)) {
        if (stagingTableGr.task.company.name !=
 stagingTableGr.u_company) {
            obj.validationPassed = false;
            obj.message = 'The Account is not matching with the
 Case Account.';
        }
    }
    return obj;
})(stagingTableGr);
```

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

Configure the account onboarding data import task

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

Before you begin

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

Procedure

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

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

5. In the Data source step, you can modify the default *Import set table name* and click **Continue**.
   The data source is created and is displayed in the Data Source tab in the Related List. Click the *Name* link to view the data source. Note that the Name field shows the data source name with the prefix *ALE DS* followed by the name of the Import set table name. The internal name of the Import set table is also displayed.
6. In the Transform map step, you can modify the default *Transform map name* and click **Continue**.
   The transform map is created and displayed in the Transform Map tab in the Related List. Click the *Name* link to navigate to the transform map and view the following:

  - Source table: This is the Import set table which contains the staging data.
  - Target table: The table to which the staging data will be moved.
  - Field maps: Shows the mapping between the fields in the source and target tables.

  The Data validation assist list view with the different types of validations is displayed.

7. Click **New** (optional step) to create a new field level or record level validation or navigate back to the Import Builder page.
8. In the Playbook activity step, navigate to the UI Views tab in the Related List.
   Note the two list views that have been created. These lists appear in the Data Import step of the account onboarding playbook.
9. Click **Continue** and navigate to the Activity Definition tab in the Related List.
   Note that a new activity definition has been created and the Import Builder process is now complete.

What to do next

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

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Add the data import task

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

1. Navigate to **All** > **Process Automation Designer**.
2. Select the **Account lifecycle onboarding process**.
3. Navigate to the Data Capture & Validation lane and select **Add an activity**.
4. Select **Account lifecycle events** and select the **Create & View Tech Task Record**.
5. Select the **Edit** icon on the newly added task to view the properties.
6. Select **View all properties** and select **Advanced**.
7. In the General tab, enter the label name and description.
8. In the When to start field, select **With Previous**. This option enables you to execute all the activities in the task in parallel.
9. Select the Automation tab and in the Inputs section, enter the following:
   - Table: The table for which the record is being created. Select **Account Lifecycle Import Task (sn_ti_core_imp_task)**.
   - Canceled Conditions: Specify the conditions that must be met before the task moves into the canceled state.
   - Closed Conditions: Specify the conditions that must be met before the task moves into the Closed state.
   - Onboarding Case: Select the Account Onboarding Case Record trigger to associate this record with the account onboarding case.
   - Record View: The name of the Form View that is to be displayed in the Account Lifecycle Events playbook. Enter `tech_pad_imp_task_view` here.

- Responsibility Name: Select the ServiceNow Developer/Admin user role from the list. This role is assigned to the internal team members (defined in the Assign internal team responsibilities task of the **Initiate** stage of the playbook. See Set up the account onboarding playbook for details). Users with this role can perform the data import task.

10. Select **Add Field** and enter data in the following fields from the Account Lifecycle Events Import Task table.
    - Source Table: Add the internal name of the staging table. For example, `sn_acct_lc_account_onb_import_locations`.
    - Target Table: Add the internal name of the target table. For example, `cmn_location`.
    - Data Source: Select the data source. For example, `cmn_location_template.xlsx`.
    - Data Import State: The default value is set to 1 (Data not loaded yet).
    - State: The default state is set to 1 (Open).
    - Type: `Select data_capture`.
    - Account: Select the account onboarding case associated with the case task.
    - Parent: Select the parent record associated with the account onboarding case.
    - Visible to customer: Set this **False.**

    Enter the Subject and Description as required and select **Done**
11. Ensure that you test the configuration and then select **Activate** to activate the playbook.

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

Import data into the account onboarding playbook

As part of the Account Lifecycle Events process, you can import, configure, and publish data.

Before you begin

- Role required: admin

About this task

After completing the first stage in the Account Lifecycle Events playbook, you can continue with the **Data Capture & Validation** stage. Several default tables have been configured with the base system. To import data into these default tables, follow these steps:

Procedure

1. Open the first table and click **Open record**.
2. In the Data Import page, click the **Details** tab.
   In the Contact field, select the customer contact who is working on this case.
3. Click the **Attachment** icon in the right-hand panel.
4. In the Attachments section, click the **Actions** icon and click **Download**.
5. Open the XLSX file and enter all records you wish to upload.

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

6. Click the plus icon to select one or more Excel files from the list and click **Upload**.
7. Click **Import from attachments** and select the files to be imported.

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

    Note:
    - If you are importing multiple files at a time, the data import process may slow down.
    - While the data is being validated, you can click **Add more** to import more files and process them in parallel.
    - If the imported data is corrupted or has several errors, select **Restart**. This action clears all the uploaded data in the staging table and restarts the process from the beginning. Data in the *`Ready to publish`* state will also be cleared.

13. Select **Close**.
14. Review the Data Import Summary, enter Close Notes for each task, and select **Mark complete** to continue with the next stage in the playbook.

Development and automation

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

Stage	Activity	Details
Development & Automation		The following activities are available with the base system: • Setup account relationships • Set maintenance schedules • Create process SLAs and offerings • Reporting • Catalog development (general) • Related work **Note:** If you have selected any of the Service Exchange integration options in the Initial Setup stage, the relevant activities are displayed and you can configure them as required.

Stage	Activity	Details
		These are demo tasks and can be configured according to your requirements. You can add or delete tasks, and modify them as required. In the Related work activity, you can create ad-hoc tasks if required. See Configure simple Account Lifecycle Events playbook tasks for details on simple configuration tasks.

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

Testing and training

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

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

Go-live and post support

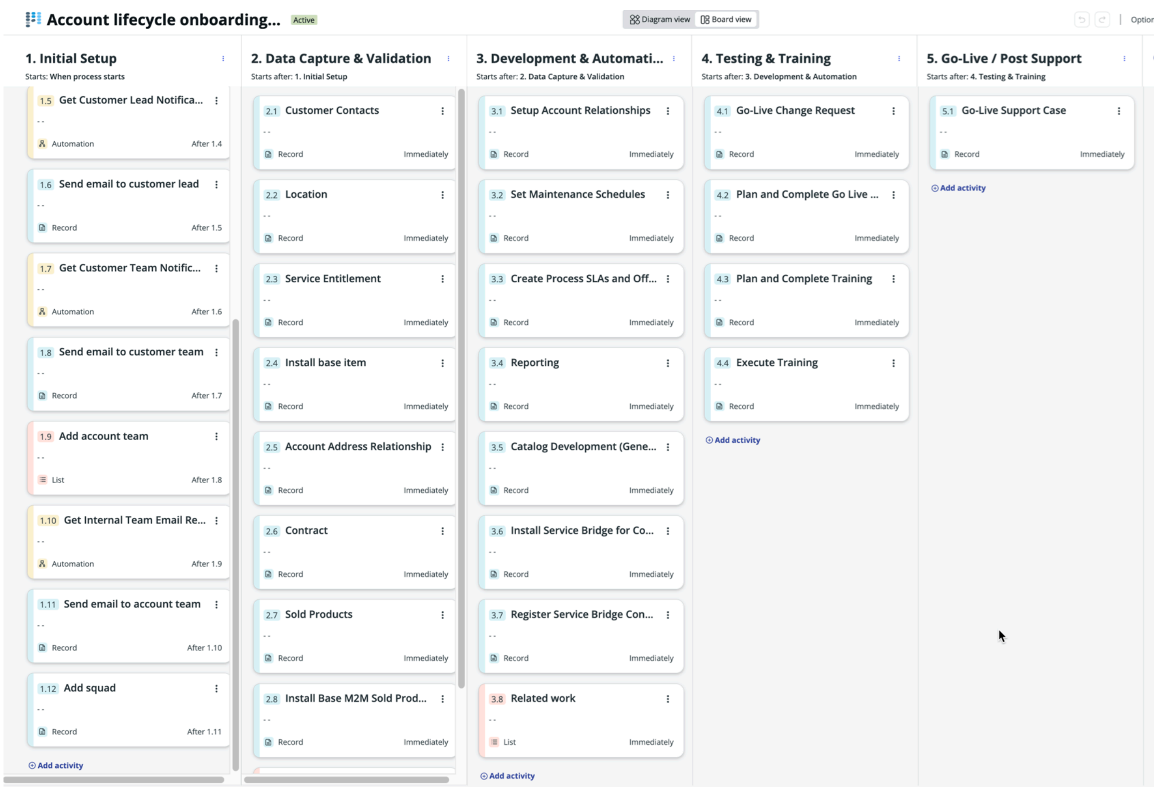
This step is meant to ensure that all steps are complete before the go-live date and resolve any outstanding issues.

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

Configure the account onboarding playbook using Process Automation Designer

Use Playbooks in Workflow Studio to configure the Account Lifecycle Events playbook.

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



Configure simple Account Lifecycle Events playbook tasks

You can configure simple playbook tasks using the Playbooks.

Before you begin

Role required:

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

About this task

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

Procedure

1. Navigate to **All** > **Process Automation Designer**.
2. Select the **Account lifecycle onboarding process**.
3. Navigate to the Development & Automation lane and select the Setup Account Relationships activity.
4. In the Activity properties window, select **View all properties** and select **Advanced**.
5. In the General tab, enter the label name and description.
6. In the When to start field, select **With Previous**.
   This option enables you to execute all activities in the task in parallel.
7. Select the Automation tab and select **Accounts Lifecycle Task** table.

8. Add all required fields and any other fields that must be populated for this task in the Account Lifecycle Events playbook.
9. Select **Done** and then **Activate**.

Set up Recommended Actions for account onboarding

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

Before you begin

Role required: admin

Procedure

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

Run scheduled job to back up staging table

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

Before you begin

Role required: admin

About this task

Data present in the staging table backed up if:

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

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

Procedure

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

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

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

Result

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

Using account onboarding

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

This section covers the following:

- Account onboarding landing page
- View account onboarding cases in the Consumer Service Portal
- Recommended actions for account onboarding
- Create a success play for account onboarding
- Account onboarding Knowledge Base

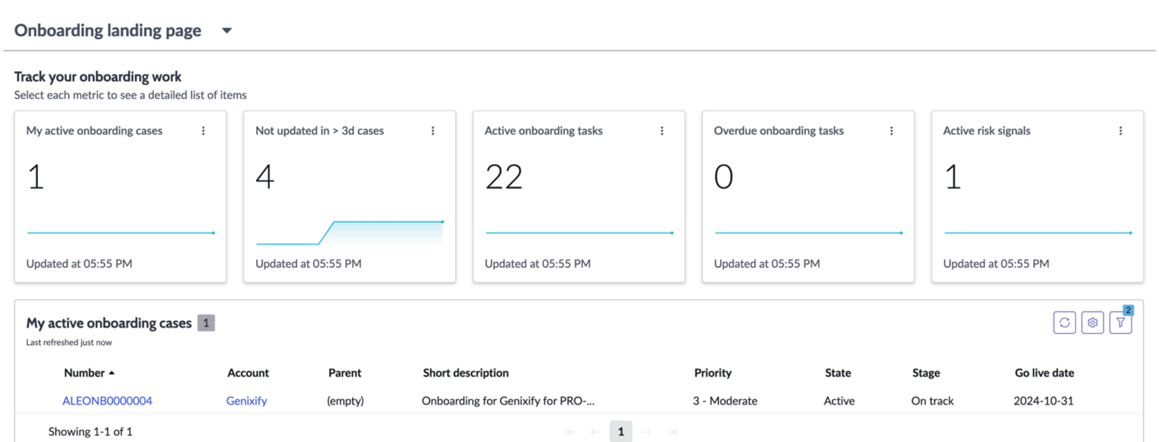
Account onboarding landing page

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

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

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

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



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

View account onboarding cases in the Consumer Service Portal

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

Before you begin

Role required:

- sn_acct_lc_agent
- sn_customerservice_customer.admin
- sn_customerservice_case_manager
- sn_customerservice.customer

Procedure

1. Use the name and password that you created during the registration process to log in to the Consumer Service Portal.
   See Using the Consumer Service Portal for details.
2. Click **My Lists** to view the account onboarding cases and case tasks.
   Both internal and external users can view the onboarding cases in the consumer service portal. The case list is filtered based on the user type and the role.
   - Internal users: When an internal user logs in with the `sn_acct_lc.agent` role, the filter is set to the **Assigned to** field and the lists are filtered as follows.
     - All Onboarding Cases: All onboarding cases present in the system are displayed.
     - My Onboarding Cases and Case Tasks: All onboarding cases and case tasks assigned to the logged in user are displayed.
   - External users: When an external user logs in, the filter is set to the **Contact** field and the lists are filtered as follows:
     - For users with the `sn_customerservice.customer_case_manager` role, the lists are filtered as follows:
       - All Onboarding Cases: All onboarding cases associated with the account managed by the logged in user are displayed.
       - My Onboarding Cases and Case Tasks: All onboarding cases and case tasks assigned to the logged in user are displayed.
     - Users with the `sn_customerservice.customer role`: Can view cases and case tasks to assigned to the logged in user in the My Onboarding Cases and My Onboarding Case Tasks lists.
3. Click on the **All Onboarding Cases** list.
   All the onboarding cases related to the selected account are displayed.
4. Click on an onboarding case in the list.

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

   The following details are displayed for each case.

   - Header section that provides basic information about the case including account name, go-live date, number of days before go-live date, and status of the onboarding case.
   - All the onboarding tasks related to the case. Click on the task to view additional information such as status, activities, and any attachments.

- The left hand section provides the following details:
  - General instructions: Provides short description and a detailed case description. Click **View More** to view all the details related to the case.
  - Product information: Shows product information only if the *`Customer visible`* flag is set to True in the account onboarding case playbook.
  - Shared articles: Shows articles that have been shared with you. Click on the article link to view details.

5. Click on an onboarding case task in the list.
   The following details are displayed for each case task:
   - Header section that provides information about the case task including case number, parent or onboarding case with which the task is associated, the account name, and status of the task.
   - The left hand section provides the following details:
     - General instructions: Provides short description and a detailed case description. Click **View More** to view all the details related to the case.
     - Shared articles: Displays articles that logged in users have access to. Click on the article link to view details.
   - All the activities related to the case task are displayed.

Recommended actions for account onboarding

Use Recommended actions to display relevant actions to agents based on a context or condition of a record.

Recommended actions appear as cards in the contextual side panel of your workspace. Depending on the type of record you're working on, these cards contain information to help you find the fastest path to resolution, minimizing the time spent researching and gathering information from different sources.

Note:

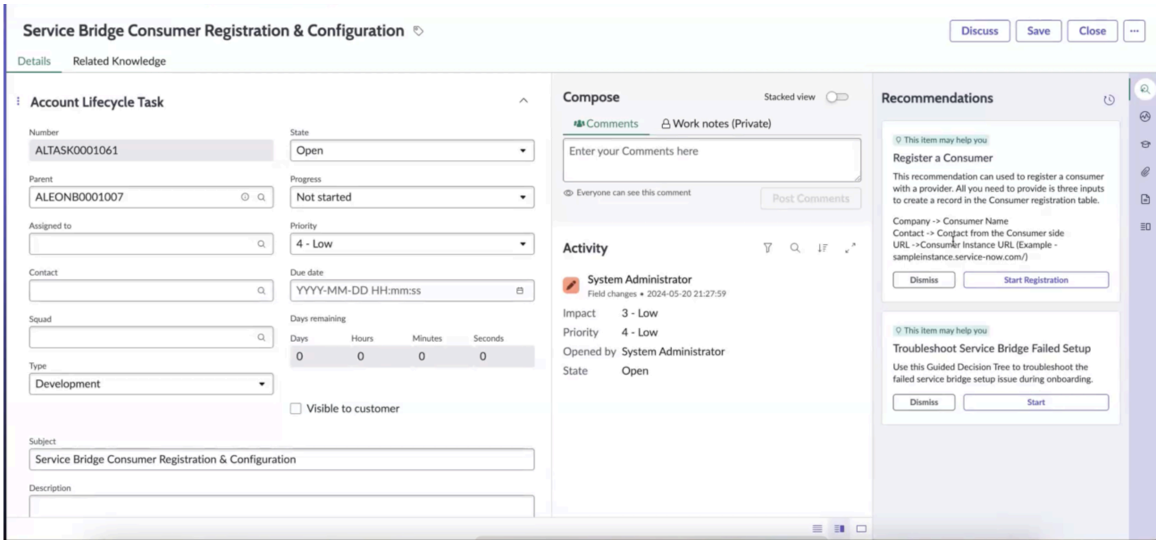
- If you are using the Washington DC release, you must installed the Recommended actions for Customer Service (`sn_cs_nb_action`) plugin to activate the Recommended Action in the contextual side panel.
- If you are upgrading from the Vancouver release to Xanadu or Washington DC, if the Recommended Action option is not displayed, you must:
  - Repair the Recommended Actions - Base Extensions (`com.snc.next_best_action`) plugin
  - Modify the settings in the CSM default record page to activate the page.

    See KB1650668 for details.

You can take three types of actions:

- Guidance: An action that can be performed or helpful information to share.
- Decision tree: A guided flow to follow that walks you through a series of questions that help you determine the appropriate action.
- Field recommendations: Recommended values to use for the fields in the record. Recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records.

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



Recommended actions available with the Account Lifecycle Events application

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

Recommended actions are available for the following account onboarding tasks:

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

Install Service Exchange for Consumer

The following recommendations are available as part of this activity:

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

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

Service Exchange Consumer Registration & Configuration

The following recommendations are available as part of this activity:

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

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

Data import recommended actions

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

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

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

Create a success play for account onboarding

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

Before you begin
Role required: sn_acct_lc.ale_success_agent

Procedure

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

Account onboarding Knowledge Base

Several Knowledge Base articles are provided for account onboarding.

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

- How to create a Data Validation Assist record: This article provides instructions on how to create a Data Validation Assist record that can be used to automate the validation process during the Data import stage.
- How to configure the trigger of the onboarding case & the playbook: This article provides instructions on how to configure the trigger for the account onboarding case and the playbook.
- How to create remote choice definition in Service Exchange for Providers: This article describes how as a provider, you can define remote choice fields that will allow consumers to retrieve choice data from their instances in real time.
- How to create remote records producer in a remote catalog in Service Exchange for Providers: This article describes how to create remote record producers as part of creating a remote catalog in the Service Exchange for Providers application.
- How to create a remote task to sync data: This article describes how you can create remote tasks to sync data between different ServiceNow® instances.
- How to create an Activity Definition: This article describes lists the steps required to create an activity definition and add it to the account onboarding playbook.
- How to attach KB to the related Knowledge tab of any ALE Task: This article describes how to automatically attach a knowledge article to the Related Knowledge tab of any account onboarding task.
- How to complete the Data Import Task: This article provides step-by-step instructions on how to complete your data import task successfully.

- Account Lifecycle Events PAD Activities Overview: This article provides an overview of the nine Playbooks activity definitions used to create the activities inside the Account Lifecycle Events (ALE) playbook.
- A Consumer's Guide to Installing Service Bridge and Registering with Providers: This article provides instructions on how to configure the Service Bridge application on the consumer instance and how consumers can register their instances with a provider.
- How to configure Account Lifecycle Events data import task: This article describes the steps required to configure the Account Lifecycle Events data import tasks so that the agents can successfully gather and upload the information needed to onboard the account.

Note:
By default, you can view any new article that is created as part of this Knowledge Base. To restrict access to an article, navigate to the article and in the `Cannot Read` field, select the user role that must be restricted from accessing the article.

Customer success

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

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

Exploring customer success

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

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

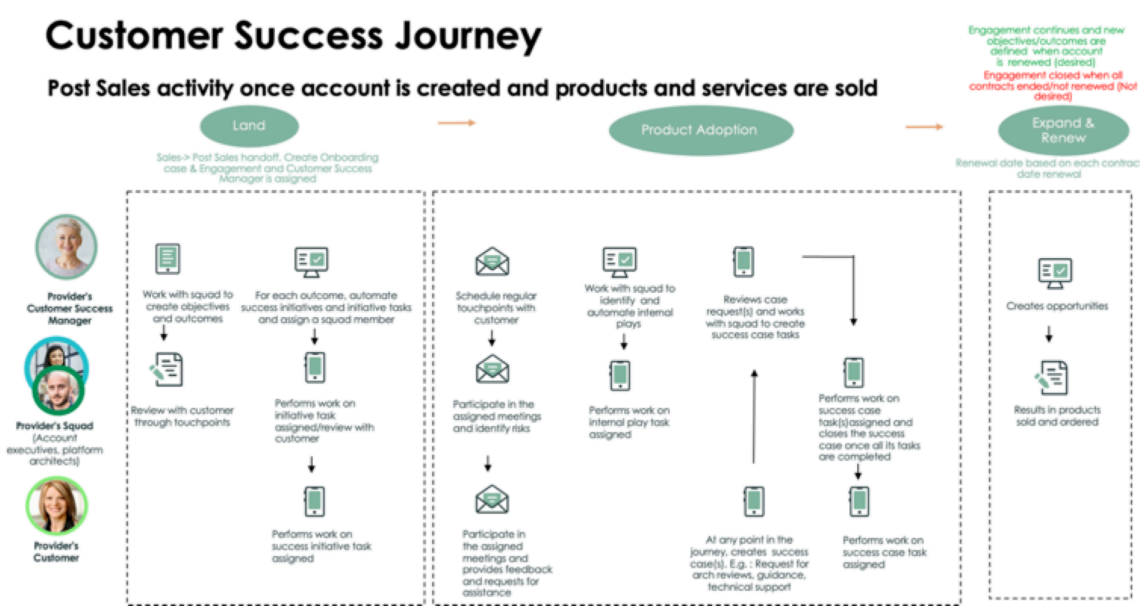
- Inspire customer loyalty and retention, not only ensuring adoption but also customer mastery of its products.
- Increase chance of renewals by providing sales and account teams information from various gathered signals.
- Decrease customer churn by identifying and mitigating risks and issues.
- Boost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

Customer success workflow

Customer success includes the following:

- Customer success data model and records.
- Customer success portfolio landing page.
- Engagement workspace pages.
- Process based experience with sample playbook for success initiatives.
- Success play launcher that can be used to create automated or manual activities.

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



Configure customer success

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

This section covers the following:

- Create an engagement
- Create a success initiative
- Create an ALE definition record
- Create an ALE choice record
- Create a success play
- Create an internal play

- Create a success case
- Define risk signal to solution relationship
- Create a success blueprint

Create an engagement

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

Procedure

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

Engagement form

Field	Description
Number	System generated unique number for the engagement.
Account	Select the account number of the enterprise customer from the list. This is a mandatory field.
Account manager	Main internal stakeholder responsible for the account.
Customer success manager	The primary internal stakeholder who is in charge of driving customer success for the account.
Key customer contact	Main external stakeholder responsible for the account.
Squad	The supporting team members handling the account.
State	State of the engagement record. This can be: ◦ New ◦ Define ◦ In progress ◦ Canceled ◦ Closed
Stage	Current stage of the engagement lifecycle. This can be: ◦ Initial on-boarding ◦ Adoption ◦ Expand

Field	Description
	○ Renew ○ Lost
Perceived health	Perceived health of the engagement. This can be: ○ Unknown (this is the default) ○ Red ○ Yellow ○ Green
Initial onboarding	Select the initial account onboarding case associated with this account. This is a mandatory field.
Initial go-live	The customer's initial go-live date.
Renewal date	The renewal date for the customer contract.
Title	Enter a title for this engagement record. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the engagement record.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this engagement record.
Work notes	Any internal notes regarding this engagement.

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

What to do next

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

Create a success objective

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

Procedure

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

Success objective form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the objective is to be related. This is a mandatory field.
Objective owner	The individual responsible for the objective from the provider side.
Sponsor	External contact responsible for the objective.
Products	The sold products that match the objective.
Driver	The driving category reason behind the objective.
State	State of the engagement record. This can be: ○ New ○ Define ○ In progress ○ Canceled ○ Closed
Progress	Current progress of this objective. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this objective in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date which the work towards this objective is scheduled to start.
Planned stop	Date which the work towards this objective is scheduled to stop.
Title	Enter a title for this objective. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the objective.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this objective. This is a mandatory field.

Field	Description
Work notes	Any internal notes regarding this objective.

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

Create a success outcome

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

Before you begin
Role required: sn_acct_lc.ale_success_agent

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

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

Success outcome form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Success objective	Select the success objective with which this outcome should be associated. This is a mandatory field.
Owner	The internal person responsible for tracking the achievement of this outcome.
State	State of the success outcome. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this outcome. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled

Field	Description
Priority	Priority of this outcome in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Planned start	Date which the work towards this outcome is scheduled to start.
Planned stop	Date which the work towards this outcome is scheduled to stop.
Title	Enter a title for this outcome. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the outcome.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this outcome. This is a mandatory field.
Work notes	Any internal notes regarding this outcome.
Unit	Unit of measurement of this success outcome.
Tracking method	Tracking method for this outcome. ○ Indicator KPI ○ Survey ○ Report ○ Manual
Base value	Starting point or base value for this outcome.
Target value	Target value that is to be achieved.
Current value	Current value of the success outcome.

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

Create a touchpoint

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

Procedure

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

Touchpoint form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the touchpoint is related. This is a mandatory field.
Channel	The channel used for communication. This can be: ◦ Web ◦ Phone ◦ Email ◦ Chat ◦ Social ◦ Community ◦ Alert ◦ Virtual Agent
Contact	The key customer contact for this touchpoint.
Assigned to	The key internal team member handling this touchpoint.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this touchpoint. This can be: ◦ General conversation ◦ Value and adoption ◦ Expansion opportunities ◦ Renewal support
State	State of the touchpoint. This can be: ◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this touchpoint. This can be: ◦ Not Started ◦ On-Track

Field	Description
	◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this touchpoint in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the touchpoint should be completed.
Product	The product to which this touchpoint is related. Select the checkbox to indicate if the touchpoint is related to a specific product that has been sold.
Subject	Enter the subject for this touchpoint. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the touchpoint.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this touchpoint. This is a mandatory field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that needs to be provided to the customer.
Meeting date	Date on which the touchpoint meeting is to be held.
Meeting type	Type of meeting which can be: ◦ Ad-hoc ◦ Weekly status ◦ QBR ◦ Renewal

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

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

Create a risk signal

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

Procedure

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

Risk signal form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the risk signal is related. This is a mandatory field.
Reported by	The internal team member who reported this risk signal.
Assigned to	The key internal team member responsible for handling this risk signal.
Squad	The team supporting this account for achieving both value and success.
State	State of the risk signal. This can be: ◦ New ◦ Active ◦ Canceled ◦ Closed
Priority	Priority of this risk signal in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the risk signal should be addressed.
Risk or issue	Indicate whether this is a risk or an issue.
Short description	Enter a short description for this risk signal. This is a mandatory field.

Field	Description
Watch list	Select the users who should be notified of any updates to the risk signal.
Watch notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this risk signal. This is a mandatory field.
Work notes	Any internal notes regarding this risk signal.
Tracking method	The origin of the risk signal. This can be: ◦ Manual ◦ Automated ◦ Integration
Table	Select the table used by the risk signal record.
Source record	Select the source record from which the risk signal originated.
Scope	Indicate whether this risk signal is related to customer success or onboarding. This can be: ◦ Onboarding ◦ Adoption ◦ Expansion ◦ Renewal
Probability	The probability that this risk may occur. This can be: ◦ Very high ◦ High ◦ Moderate ◦ Low ◦ Very low This is a mandatory field.
Contracts impacted	The contracts impacted by this risk or issue.
Products impacted	The products impacted by this risk or issue.

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

Create a success initiative

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

Before you begin

Role required: sn_acct_lc.ale_success_agent, sn_acct_lc.ale_success_customer

About this task

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

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

Procedure

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

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

	○ Low ○ Very Low
Due date	Date on which this initiative is due.
Subject	Enter a subject for this initiative.
Description	Enter a description for this initiative.

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

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

What to do next
You can perform the following actions:

- Assign to me: Select this option to reassign this initiative to yourself.
- Close initiative: Once the initiative has been completed and the Closure code is set to **Achieved**, you can close this initiative.
- Create success play: Select this option to create a success play. See Create a success play for details.

Create an ALE definition record

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

Before you begin

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

About this task

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

Procedure

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

ALE definition form

Field	Description
Flow	Select the subflow that should be triggered by this ALE definition record. This subflow must be defined and configured using Flow Designer.
Category	Select the category for the success play.
Sub category	Based on the category you select, the related sub categories are displayed. Select the sub category from the drop down list.
State	Select the state for this ALE definition record. This can be: ◦ Draft ◦ Published ◦ Closed ◦ Canceled
Order	Specify the order in which the categories should appear in the workflow launcher pages.
Title	Enter a title for the workflow launcher item.
Description	Enter a description to specify the purpose of this workflow launcher item.

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

Create an ALE choice record

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

Before you begin
Role required: sn_ti_core.write

Procedure

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

Create a success play

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

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

Procedure

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

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

Define subflows for success plays

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

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

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

Definition record form

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

4. Click **Submit**.

Create an internal play

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

Before you begin

Role required: sn_acct_lc.ale_success_agent

About this task

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

Procedure

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

Success case form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	The engagement record to which the internal play is related.
Assigned to	The key internal team member responsible for this internal play.
Squad	The team supporting this account for achieving both value and success.
State	State of the internal play. This can be:

Field	Description
	◦ New ◦ In progress ◦ Paused ◦ Canceled ◦ Closed
Progress	Current progress of this internal play. This can be: ◦ Not Started ◦ On-Track ◦ At Risk ◦ Paused ◦ Completed ◦ Canceled
Priority	Priority of this internal play in comparison to others. This can be: ◦ Critical ◦ High ◦ Medium ◦ Low ◦ Very Low
Due date	Date by which the internal play should be completed.
Short description	Enter a short description for this internal play. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the internal play.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this internal play. This is a mandatory field.
Work notes	Any notes to internal team members regarding this internal play.

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

What to do next

Create internal play tasks to define tasks that should be performed when an internal play is launched.

Create an internal play task

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

Before you begin

Role required: sn_acct_lc.ale_success_agent servicenow

Procedure

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

Success case form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Engagement	Select the engagement record to which the internal play task is related.
Internal play	The internal play with which this task is to be associated is displayed. You can select a different internal play from the drop down list.
Assigned to	The key internal team member responsible for this internal play task.
Squad	The team supporting this account for achieving both value and success.
State	State of the internal play task. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this internal play task. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this internal play task in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low

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

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

Create a success case

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

Before you begin
Role required: sn_acct_lc.ale_success_agent

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

Procedure

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

Success case form

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

Field	Description
	○ Guidance ○ Architecture review ○ Demos and POCs ○ Training
State	State of the success case. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed
Progress	Current progress of this success case. This can be: ○ Not Started ○ On-Track ○ At Risk ○ Paused ○ Completed ○ Canceled
Priority	Priority of this success case in comparison to others. This can be: ○ Critical ○ High ○ Medium ○ Low ○ Very Low
Due date	Date by which the success case should be completed.
Product	The product associated with the success case.
Service definition	Service definitions work with case types to provide different types of service requests. With this feature, you can create connections between products and services and the case types that support those services.
Short description	Enter a short description for this success case. This is a mandatory field.
Watch list	Select the users who should be notified of any updates to the success case.
Work notes list	Select the users who should be notified of any updates to the worknotes.
Description	Enter a description for this success case. This is a mandatory field.
Work notes	Any internal notes regarding this objective.
Additional comments	Any additional information that needs to be provided to the customer.

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

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

Create a success case task

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

Before you begin
Role required: sn_acct_lc.ale_success_agent

Procedure

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

Success case form

Field	Description
Number	System generated unique number for the onboarding case record.
Account	The account number of the enterprise customer associated with the account.
Parent	The parent success case with which this task is to be associated is displayed. You can select a different success case task from the drop down list.
Contact	The key customer contact for this success case task.
Assigned to	The key internal team member handling this success case task.
Squad	The team supporting this account for achieving both value and success.
Category	The category associated with this success case task. This can be: ○ Workshops and meetings ○ Design reviews ○ Product training ○ Professional services
State	State of the success case task. This can be: ○ New ○ In progress ○ Paused ○ Canceled ○ Closed

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

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

Define risk signal to solution relationship

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

Before you begin

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

Procedure

1. Navigate to the **All** menu and enter `sn_acct_lc_risk_signal_solution_relationship.list`
2. Click **New** in the Risk Signal to Solution Relationships page.

3. On the form, fill in the fields.

Success case form

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

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

Create a success blueprint

Use this option to create a success blueprint or a template to create automated activities that need to be executed during the engagement lifecycle.

Before you begin
Role required: sn_acct_lc.ale_success_agent

Procedure

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

Using customer success

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

This section covers the following:

- Success landing page
- Engagement record page
- Success objective record page

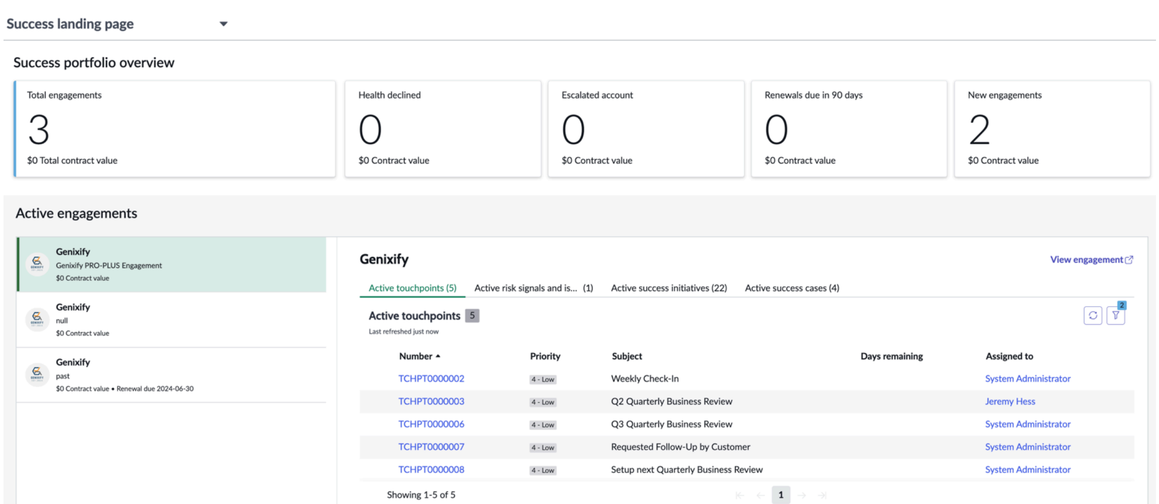
Success landing page

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

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

- Total engagements: The total number of engagements with which you are associated.
- Health declined: The number of engagements whose Perceived health has declined and is in a yellow or red state.
- Escalated account: The number of engagements with escalated accounts.
- Renewals due in 90 days: The number of engagements with renewals due in 90 days.
- New engagements: Any engagements that are new and do not have objectives associated with them.

Click on a tile to drill down to the list of engagements that match the criteria.



You can also view the following:

- Total number active engagements.
- Select an engagement to view a list of active touchpoints, risk signals, success initiatives, and success cases. You can click on a link to drill down to the detailed record page.

Select an active engagement and click **View engagement** to view the engagement record page.

Engagement record page

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

To view this page, follow these steps:

1. Login as a user with the `sn_acct_lc.ale_success_agent` role.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workpace** and select the **List** icon.
3. Navigate to **Customer Success** > **All Engagements** and click **Number** column to open the engagement record. The page includes the following details:
   - Engagement details: Shows the contract value, health score, engagement stage, account with which it is associated, and the renewal date.
   - Key customer contact: Shows detailed contact information for the key customer contact.
   - Customer team: Shows the list of customer team members.
   - Squad: Shows the squad members associated with the engagement.
4. Navigate to the **Overview** tab. You can view:
   - Upcoming touchpoints: List of all upcoming touchpoints. Click the Touchpoint link to drill down to the record page.
   - Success initiative overview: List of success initiatives associated with the engagement along with the success outcome and the number of days left for renewal. Click the Success initiative or Success outcome links to drill down to the related record page.
   - Success cases: List of success cases associated with the engagement. Click the link to drill down to the record page.

   Click **View all** in any of the sections to see a list of all touchpoints, initiatives, or cases that you can view.

5. Navigate to the **Success blueprint** tab to view the list of active success objectives associated with the engagement. Click **View all** to view all the success objectives associated with the account. Click **View success objective** to view the success objective record page.

Success objective record page

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

To view this page, follow these steps:

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

This page includes the following sections:

- Header: This section shows the status, the driving category, the number of days left for this objective to be completed, and the planned end date.
- Success outcomes: The success outcomes associated with the objective. Select a success outcome to view the success initiatives associated with it.
- Success initiatives: The list of initiatives associated with the selected success outcome. The subject, progress, and the number of days remaining are displayed. Click the **Number** column to drill down to the Success Initiative record page.

Account Lifecycle Events reference

Reference topics provide additional information about Account Lifecycle Events application.

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

Domain separation and Account Lifecycle Events

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

Support level: Basic

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

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

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

Overview of Account Lifecycle Events

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

How domain separation works in Account Lifecycle Events

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

Setting up domain separation in Account Lifecycle Events

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

Domain separated tables

- Account onboarding case [sn_acct_lc_onb_case]
- Account lifecycle import task [sn_ti_core_imp_task]
- Account lifecycle task [sn_ti_core_task]
- Engagement [sn_acct_lc_engagement]
- Success objective [sn_acct_lc_success_objective]

- Success outcome [sn_acct_lc_success_outcome]
- Success initiative [sn_acct_lc_success_initiative]
- Success case [sn_acct_lc_success_case]
- Success task [sn_acct_lc_success_task]
- Touchpoint [sn_acct_lc_touchpoint]
- Internal play [sn_acct_lc_internal_play]
- Internal play task [sn_acct_lc_internal_play_task]

Related topics

Domain separation for service providers

Account onboarding users and roles

An overview of the tasks that can be performed by the different Account Lifecycle Events users and their required roles and user criteria.

Users and roles

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

Customer success roles

Roles added with Account Lifecycle Events.

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

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

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

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

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

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

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

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

Customer success flows

This section includes the customer success flows.

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

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

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

Customer success business rules

This section includes the customer success business rules.

Business rule	Table	Description
Domain - Set Domain	Engagement	Sets the domain information.
Required fields for engagement	Engagement	Validates required fields.
State is closed or canceled	Engagement	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Engagement is reopened	Engagement	Ensures closure information is removed and object is marked active before reopening.
Validate account change for engagement	Engagement	Prevent account change if the engagement has objectives, success cases, internal plays, or risk signals associated with it.
Validate engagement parent	Engagement	Prevent cyclic relationship for the parents in engagement hierarchy.
Validate onboarding for engagement	Engagement	Ensures the engagement account matches the account of its onboarding case and sets the go live date based on the go live date of its onboarding case.
Domain - Set Domain	Success objective	Sets the domain information.
Required fields for objective	Success objective	Validates required fields
Validate closure for objective	Success objective	Ensures closure information is populated and object is marked inactive before marking closed/canceled.

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

Business rule	Table	Description
Validate engagement update	Success case	Prevents engagement change if the success case has success tasks or risk signals associated with it.
Required fields for touchpoint	Touchpoint	Validates required fields.
Validate closure for touchpoint	Touchpoint	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Touchpoint is reopened	Touchpoint	Ensures closure information is removed and object is marked active before reopening.
Validate engagement update	Touchpoint	Prevents engagement change if the touchpoint has success tasks or risk signals associated with it.
Required fields for success task	Success task	Validates required fields.
Validate closure for success task	Success task	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Success task is reopened	Success task	Ensures closure information is removed and object is marked active before reopening
Validate parent change for success task	Success task	Prevents parent change if the success task has risk signals associated with it.
Required fields for internal play	Internal play	Validates required fields.
Internal play is closed or canceled	Internal play	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play	Internal play	Ensures closure information is removed and object is marked active before reopening.
Parent for internal play must be empty	Internal play	Ensures parent is empty for all internal plays.
Validate engagement change	Internal play	Prevents engagement change if the internal play has internal play tasks or risk signals associated with it.
Required fields for internal play task	Internal play task	Validates required fields.
Internal play task is closed or canceled	Internal play task	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen internal play task	Internal play task	Ensures closure information is removed and object is marked active before reopening.
Validate internal play change	Internal play task	Prevents internal play change if the internal play task has risk signals associated with it.
Domain - Set Domain	Risk signal and issue	Sets the domain information.

Business rule	Table	Description
Field validation	Risk signal and issue	Validates required fields.
Validate risk signal closure	Risk signal and issue	Ensures closure information is populated and object is marked inactive before marking it as closed or canceled.
Reopen risk signal	Risk signal and issue	Ensures closure information is removed and object is marked active before reopening
Avoid duplicate definition record	Definition record	Ensures the no two records share the same title and category.
Domain - Set Domain	Definition record	Sets the domain information.
Set active flag	Definition record	Sets status to active if published, else inactive.
Avoid duplicate risk signal solution	Risk signal solution relationship	Ensures the no two records share the same solution record.
Avoid duplicate squad member	Squad member	Ensures the no two records share the same user and responsibility
Domain - Set Domain	Squad member	Sets the domain information.
Avoid duplicate engagement to contract relationship	Engagement to contract relationship	Ensures the no two records share the same engagement and contract.
Validate contract account	Engagement to contract relationship	Ensures contract account matches the engagement account.
Contract relationship updated	Engagement to contract relationship	Ensures renewal date for engagement is updated to the date of the earliest non expired contract.
Contract relationship removed	Engagement to contract relationship	Ensures renewal date for engagement is updated to the date of the earliest non expired contract.

Customer success tables

This section includes the customer success tables.

Table	Description
Engagement	As a provider, delivering value to an enterprise customer [account] is not a ‘one-time’’ event, it is a journey with multiple activities, both internal and external during its lifecycle.
Success objective	Success objectives represents the value that the provider has sold to an enterprise customer. This value can be defined for one or more products.
Success outcome	Success outcomes are measurable components of success objectives. They can be monitored through analytics within the ServiceNow Platform or through a 3rd Party integration tools.

Table	Description
Success initiative	Success initiatives are a planned set of actions (workflows) that the provider and enterprise customer agree to take and complete on the customer's value realization journey.
Success case	Success cases are an unplanned set of actions a provider takes to support a customer engagement activity.
Success task	Success tasks are planned or unplanned actions that either the provider or enterprise customer must complete in support of a success initiative (planned) or a success case (unplanned).
Touchpoint	A touchpoint captures and supports conversations such as scheduling calls, sharing reports, and presentation material.
Internal play	Internal plays are planned or unplanned actions tied to the engagement lifecycle. Internal plays often require internal sub-tasks and follow a playbook with pre-defined activities.
Internal play task	Internal play tasks are actions that are created as result of a specific internal plays being created. These tasks must have a clear purpose and if possible, must be created through playbook automation [automatic, optional, or conditional].
Risk signal and issue	Risk signals and issues are a way of recording and managing risks tied to an engagement or onboarding so that the provider can take appropriate actions.
Definition record	The ALE definition record is used to specify categories that can be used to launch success play workflows that can create records and trigger playbooks automatically.
Success launcher notifier	The success launcher notifier tracks the status of the success play.