

Customer Service Management Training: Introduction to Blocking Tasks Module

Web-based Training Script

Course Name: Introduction to Blocking Tasks

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Developer: ServiceNow

Expected Training Launch Date: 2/10/2020

Format: eLearning

Estimated Training Time: 5 minutes

Introduction to Blocking Tasks				
Basic Content: Text, media (images and video), audio narration				
Slide No.	Text	V.O. Narration	Media	Programming Notes
1.	Introduction to Blocking Tasks <i>Your next step in the customer service journey</i> This 5-minute training will provide a quick look at Blocking Tasks, what causes them, and how they are resolved. Click next to begin!	<i>(No audio narration for this slide)</i>	Slide 1 – laptop with ServiceNow on screen.jpg	Clicking “next” begins the course. Clicking “previous” returns the learner to the Customer Service Management curriculum menu.

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2.	Blocking Task (n.): a case roadblock that needs the agent and/or customer's action before it can be resolved <i>(Button)</i> Wait, I already know this! (Click to jump to knowledge check)	Simply put, when agents run into a problem that's preventing them from moving forward with the case, they can add a "Blocking Task". The case can't move forward in the resolution process until something is fixed. Let's find out what might cause a "Blocked case". Do you already know about Blocking Tasks? Click the green button to jump to the knowledge check and test out.	Slide 2 – don't cross light.jpg	If the learner clicks the green button, it will jump to slide 9 (the knowledge check) and they can attempt to test out. If the learner fails the knowledge check, it will take them back to slide 2. They can't attempt to test out again after one failed try.
3.	What causes a Blocking Task? Click the box to show the agent's process. <i>(Button)</i> Needs More Information	When the agent needs to create a "Blocking Task", they set the state of the case to "Needs More Information". Click the box to show the process.	Slide 3 – tree with icons on its branches.png	When the learner clicks the "Needs More Information" box, it expands. See slide 4.
4.	First, the agent sets the state of the case to Needs More Information. Then, the agent associates the case with one of these: • Problem	After the agent sets the state of the case to "Needs More Information", it will be associated with one of the categories shown here. Click each one to learn more. Keep in mind you can always find these resources in the ServiceNow Resources Library –		When the learner clicks any of the links, they open in a new window. These are the same links as found in the Resources library.

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	• Request • Change • Incident • Case task • Work order Note: This will enable the Needs Attention Field on the customer's case form.	accessed by clicking the Resources button at the top right of your screen.		Note: I'm making the assumption that clicking the "Resources" tab will take the learner to the ServiceNow Resource Library.
5.	How are Blocking Tasks resolved?	The resolution of "Blocking Tasks" are critical to ServiceNow's customer service commitment. Let's explore how "Blocking Tasks" are resolved.	<i>(No graphics)</i>	
5a.	Which of the following resolve Blocking Tasks for cases? ▪ A related case task or work order is closed or cancelled. ▪ An unrelated case task or work order is opened. ▪ A fix or a workaround is associated with a	Read each option and select all that apply. This isn't graded so feel free to explore.		Multiple choice assessment type. Infinite tries. Once the learner selects four boxes, the answer auto-submits. There are infinite tries, and this is open navigation so they can click next at any time. The correct answers are marked in red. CORRECT: That's right!

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	related problem record. ▪ A customer provides the requested information. ▪ An agent gives up on the case and closes it. ▪ A related problem, request, change, or incident record is resolved.			TRY AGAIN: Sorry, that isn't right. Need help? Select one or more of the on-screen resources to find the answer. (Developer note: when the learner clicks the resources, they open in a new window.)
5b.		If you're stumped, check out the three boxes at the bottom right of your screen. The yellow box is a printable job aid that shows the resolution process. The blue box is "ServiceNow's Blocking Task guidelines". And the green box is a Frequently Asked Questions provided by the ServiceNow experts. Keep in mind you can find these in the ServiceNow Resource Library.	Job Aid.png, Guideline.png, FAQs.png	When the learner clicks the Job Aid, Guideline, or FAQs it will open the associated documents in a new window. These are the same links as found in the Resources library.
6.	How to easily check for blocked cases	Now that you know what "Blocking Tasks" are, how they are caused, and how to resolve them, let's see	Slide 6 – Laptop black screen.jpg	The laptop monitor starts off blank until the learner clicks one of the buttons.

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	Click each to learn more. <i>(Button)</i> Blocked by <i>(Button)</i> Action Status	how to get a quick view of cases that have been marked as blocked. When an agent marks a case as “blocked,” the system automatically does two things. Click each box to learn more.		See slide 7 for the “Blocked by” click actions. See cell 8 for the “Action Status” click actions.
7.	<i>(Blocked by button screen)</i> Learn more: Blocked by	When the agent marks that the case is blocked, the system automatically adds the case to the “Blocked by” form section. Click the play button to see a walkthrough. And if you’re curious to learn more about Blocked by and its related fields, click the “Learn more” button. Video narration: Agents can track which cases have been assigned a blocking reason through the Agent Workspace’s “Blocked by” form section. This section makes my life way easier because I’m able to get a quick view of everything I need to focus on today.	Slide 7 – Blocked by video walkthrough.mp4	When the learner clicks the play button, the video will go full screen. Once the video has finished playing it will automatically close. This 15 second video is a subject matter expert walking us through accessing the Agent Workspace, locating the “Blocked by” tab, and stating why it makes their life easier (something exemplary learners do e.g. I get a quick view of everything I need to focus on today.) If the learner clicks the “Learn more: Blocked by” button, it will direct them to

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				the ServiceNow's "Blocked by" guidelines. This is the same link found in the Resources library.
8.	<i>(Action Status button screen)</i> Learn more: Action Status	The system also updates the "Action Status" field on the Case form and Case list. Click the play button to see a walkthrough. And if you're curious to learn more about Action Status, click the "Learn more" button. Video narration: Here you can see color indicators that provide quick info on the cases. Blue highlights cases that need attention, such as cases that have already been updated by customers or internal users and are waiting for your input or review. Red highlights cases that are blocked. A blocked case can have the following status: "Blocked by task," "Blocked by customer," or "Blocked internally and by customer". I look for all of the blue indicators first to see what needs immediate action.	Slide 8 – Action Status video walkthrough.mp4	When the learner clicks the play button, the video will go full screen. Once the video has finished playing it will automatically close. This 15 second video is a subject matter expert walking us through accessing the Agent Workspace, locating the "Action Status", and giving a tip on streamlining the process (something exemplary learners do e.g. I look for all of the blue indicators first to see what needs immediate action.) If the learner clicks the "Learn more: Action Status" button, it will direct them to the ServiceNow's "Action Status" guidelines.

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				This is the same link found in the Resources library.
9.	Hey. I'm KASSANDRA Customer for 10 years <i>My company has partnered with ServiceNow for 10 years. Recently, I had an issue and reached out to customer support, but it hasn't been resolved yet. Help!</i>	Our customers have a lot going on in their lives. Take Cassandra for instance – she's one of our long-time customers. She opened a case and it hasn't been resolved because of a blocking task. Let's find out why. Click the next button to begin the knowledge check.	Side 9 – Cassandra smiling on phone.jpg	Clicking the next button begins the knowledge check.
10.	An agent wants to check the Case list to find why Cassandra's case is blocked. From the Agent Workspace, where should they click? Click on the correct area. <i>(The correct area is the Blocked by tab)</i>	<i>(No audio narration for this slide)</i>	Slide 10 – screenshot of ServiceNow Agent Workspace.jpg	Knowledge check question 1 of 3. Hotspot assessment type. Enable click to zoom feature so learners are able to see the screenshot full screen.

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				Feedback: CORRECT: Yes! The Blocked by tab is the place to go for a quick look at the Case list and which cases are blocked. TRY AGAIN: That's not right. Try again? INCORRECT (after one try): Sorry, that isn't right. How about a refresher? (Developer note: when the learner clicks "How about a refresher" it takes them back to slide 7 and when they click "next" they will return to this slide. The slide will be reset to initial status.)
11.	The agent sees that Kassandra's case state has a blue indicator on the Action Status column in the Case list. That means: Choose the best answer	<i>(No audio narration for this slide)</i>	<i>(No graphics)</i>	Knowledge check question 2 of 3. Multiple choice assessment type. Feedback: CORRECT: That's right! When the Needs Attention

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	1. The case has been closed. 2. The case needs attention. 3. The case has been unblocked.			field on the Case list is enabled, the Action Status column displays a blue indicator. TRY AGAIN: Not quite. Want to give it another try? INCORRECT (after one try): Sorry, that isn't right. How about a refresher? (Developer note: when the learner clicks "How about a refresher" it takes them back to slide 8 and when they click "next" they will return to this slide. The slide will be reset to initial status.)
12.	What is the sequence that needs to happen before the Blocking Task can be resolved? Arrange the answers in the correct order. 1. The agent sets the state of the case to Needs More	<i>(No audio narration for this slide)</i>	<i>(No graphics)</i>	Knowledge check question 3 of 3. Sequencing assessment type. Feedback: CORRECT: Great job! Now that Cassandra has filled out the missing information, the agent is

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	Information from customer. 2. On Kassandra's side, the Needs Attention field is enabled on the Case form. 3. Kassandra provides more information and submits the updated Case form. 4. The Blocking Task is resolved, and the agent can continue to assist Kassandra's case.			able to move forward with the case process. TRY AGAIN: Not quite. Want to give it another try? INCORRECT (after one try): Sorry that's not right. How about a refresher? Hint: Check the resources! (Developer note: when the learner clicks "How about a refresher" it takes them back to slide 5. The answer is embedded in the resources. When they click "next" they will return to this slide. The slide will be reset to initial status.)
13.	You did it! You helped Kassandra with your knowledge of Blocking Tasks and her case is now resolved. Check out the Resources in the upper right menu to access the ServiceNow Resource Library.		Slide 13 – happy Kassandra.jpg	Clicking the "Mark as Complete" button completes the course and closes the window.

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	We wish you the best of luck assisting your next customer! (Button) Mark as Complete			
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