

Certified Implementation Specialist - Customer Service Management (CIS-CSM) Practice Test (Sample)

Study Guide



Everything you need from our exam experts!

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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 - 45 minutes). Review a handful of questions, reflect on the explanations.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!

Questions

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- 1. Which statement best describes the default visibility for a customer with the sn_customerservice.customer role on the portal?**
 - A. Assets, Contacts, and Contracts are visible**
 - B. Publications and Products are visible**
 - C. Assets and Publications are visible**
 - D. All records including internal notes are visible**

- 2. Which of the following is NOT a purpose of Articles?**
 - A. Document current and known issues**
 - B. Provide answers and responses to common issues or questions**
 - C. Information about customer's service contract**
 - D. Share product information**

- 3. Which item should be part of the pre-engagement collateral?**
 - A. Frequently Asked Questions (FAQ)**
 - B. Scoping Guide**
 - C. Customer Service roles template**
 - D. Stock Keeping Unit (SKU) and pricing sheet**

- 4. Which statement best describes the role of the Assignment Workbench?**
 - A. It enables managers to assign tasks to agents via configurable criteria**
 - B. It stores customer contact information**
 - C. It analyzes entitlements**
 - D. It manages product inventory**

- 5. External customers can approve which of the following via the customer portals?**
 - A. Request Records and Escalations**
 - B. Change Records & Request Records**
 - C. Problem Records & Escalation**
 - D. Problem Records & Incident Records**

- 6. The statement 'The ServiceNow Communities feature is available only for customers with ServiceNow CSMS licenses' is true or false?**
- A. True**
 - B. False**
 - C. Not stated**
 - D. Depends on edition**
- 7. If only one user reports content for moderation, the content will be hidden.**
- A. True**
 - B. False**
 - C. It will be hidden after review**
 - D. It will be automatically deleted**
- 8. Which action is NOT available when configuring chat for Agent Workspace?**
- A. Escalate the chat to virtual agent**
 - B. Create a record, such as an incident or a case**
 - C. Escalate the chat to another agent**
 - D. Respond to questions**
- 9. Special Handling Notes can apply to which item based on specific attributes?**
- A. Domain**
 - B. Contact**
 - C. Holiday**
 - D. VIP**
- 10. Which capability is described by the CSM Configurable Workspace sidebar for speeding up case resolution?**
- A. Visibility of case details at all times**
 - B. Access to response templates to help resolve cases faster**
 - C. Real-time collaboration with other agents or SMEs**
 - D. Managerial chat monitoring**

Answers

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1. A
2. C
3. C
4. A
5. B
6. B
7. B
8. A
9. B
10. C

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Explanations

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1. Which statement best describes the default visibility for a customer with the sn_customerservice.customer role on the portal?

- A. Assets, Contacts, and Contracts are visible**
- B. Publications and Products are visible**
- C. Assets and Publications are visible**
- D. All records including internal notes are visible**

The ability a user has in the customer portal is determined by their role, controlling what data they can see by default. For a user with the sn_customerservice.customer role, the portal is scoped to show items that belong to or are directly linked to the customer. The records that appear by default are assets (the customer's owned or managed assets), contacts (the customer's associated contact records), and contracts (the service or support agreements tied to the customer). This setup lets the customer quickly view what they own and what they have active with support, facilitating self-service and transparency. Publications and products are not shown by default in this role because exposure of catalog content or marketing/publication material is typically restricted or requires different permissions, and internal notes are kept private to staff for security and privacy reasons.

2. Which of the following is NOT a purpose of Articles?

- A. Document current and known issues**
- B. Provide answers and responses to common issues or questions**
- C. Information about customer's service contract**
- D. Share product information**

Articles in a knowledge base are built to help customers self-serve by documenting current and known issues, providing answers to common questions, and sharing product information such as features, usage steps, and release notes. These elements support quick problem resolution and product understanding without needing direct support. Information about a customer's service contract, on the other hand, is handled through contract management and account records. It covers entitlements, service levels, and billing details, not general knowledge or troubleshooting content. That's why contract information isn't considered a typical purpose of Articles.

3. Which item should be part of the pre-engagement collateral?

- A. Frequently Asked Questions (FAQ)**
- B. Scoping Guide**
- C. Customer Service roles template**
- D. Stock Keeping Unit (SKU) and pricing sheet**

Before a customer engagement begins, you need a clear map of responsibilities so everyone knows who handles what and how decisions are made. A Customer Service roles template specifies the roles involved, what each person is accountable for, who to contact for different issues, and how escalations are managed. This clarity underpins effective governance, smooth onboarding, and quicker issue resolution, making it the most effective pre-engagement collateral. FAQs are helpful for common questions but don't establish internal ownership; a scoping guide defines deliverables but not the day-to-day roles; a SKU and pricing sheet covers commercial terms rather than how the engagement will operate.

4. Which statement best describes the role of the Assignment Workbench?

- A. It enables managers to assign tasks to agents via configurable criteria**
- B. It stores customer contact information**
- C. It analyzes entitlements**
- D. It manages product inventory**

Assignment Workbench is about routing and assigning work items to agents using configurable criteria, such as agent skills, availability, workload, and priority. This lets managers ensure the right person with the right capabilities handles each task and helps balance workload automatically or through guided rules. That focus—matching work to the most appropriate agent based on defined criteria—is why this statement best describes its role. Storing customer contact information is a data management function, not about who gets which task. Analyzing entitlements relates to product or service permissions, not task assignment. Managing product inventory deals with stock levels, not routing work to agents.

5. External customers can approve which of the following via the customer portals?

- A. Request Records and Escalations**
- B. Change Records & Request Records**
- C. Problem Records & Escalation**
- D. Problem Records & Incident Records**

External customers have the ability to approve records that represent requests for changes or services. Approving a Change Record lets the customer consent to the proposed change and its schedule, while approving a Request Record confirms the requested service or activity should go ahead. Problems and incidents are typically handled and approved internally by the service team, and escalations are not usually subject to customer approvals via the portal. So the combination that aligns with what customers can approve in the portal is Change Records and Request Records.

6. The statement 'The ServiceNow Communities feature is available only for customers with ServiceNow CSMS licenses' is true or false?

- A. True
- B. False**
- C. Not stated
- D. Depends on edition

The question is testing licensing scope for the Communities feature in ServiceNow. The idea is that Communities isn't restricted only to customers who have CSMS licenses. It's a separate capability that can be accessed with various license types or as an add-on, depending on a customer's contract and the specific Now Platform arrangement. Because of that, the statement claiming exclusivity to CSMS licenses is not accurate. In practice, you'd verify the exact licensing with your ServiceNow contract, since availability can vary by edition or bundled offerings, but the key point is that Communities is not inherently limited to CSMS licenses alone.

7. If only one user reports content for moderation, the content will be hidden.

- A. True
- B. False**
- C. It will be hidden after review
- D. It will be automatically deleted

The essential idea here is how moderation workflows handle user reports. In most systems, a single report places the content into a moderation queue for review rather than hiding it automatically. The content's visibility is then decided by the reviewer or by policy-based rules, which may require additional reports or different criteria before hiding or removing content. So assuming it will be hidden after one report is not accurate. The outcome after review depends on the moderator's judgment and the platform's policy, not an automatic rule triggered by just one report.

8. Which action is NOT available when configuring chat for Agent Workspace?

- A. Escalate the chat to virtual agent**
- B. Create a record, such as an incident or a case
- C. Escalate the chat to another agent
- D. Respond to questions

In this setup, the actions available while configuring chat for Agent Workspace are centered on how agents handle a live chat session: handing off to another human agent when needed, creating records (like incidents or cases) from the chat to capture details, and directly responding to the customer's questions. The reason escalating to a virtual agent isn't offered here is that the Virtual Agent (the bot) operates as a separate component and flow, not as a direct escalation target within the Agent Workspace configuration. Bots are designed to handle routine inquiries and assist or triage before or after human support, but within the Agent Workspace's chat configuration you won't see an option to escalate directly to a virtual agent. If a bot is to be used, it's typically invoked through its own flow or handoff mechanism rather than as a standard in-chat escalation action.

9. Special Handling Notes can apply to which item based on specific attributes?

- A. Domain
- B. Contact**
- C. Holiday
- D. VIP

Special Handling Notes are used to guide how an agent should interact with a customer based on that individual's attributes, such as language preference, accessibility needs, or priority. The item that stores these notes is the contact, because it represents the person in the system and can have unique, per-person attributes that influence how service is delivered. When a case comes in for that contact, the notes surface to the agent to tailor communication, routing, and escalation. A domain isn't a person and doesn't carry per-individual instructions. A holiday is a calendar concept that affects timing rather than how a specific customer is handled. While VIP status is an attribute that can exist on a contact, the notes themselves are attached to the contact to reflect how that individual should be treated, making the contact the correct item for Special Handling Notes.

10. Which capability is described by the CSM Configurable Workspace sidebar for speeding up case resolution?

- A. Visibility of case details at all times
- B. Access to response templates to help resolve cases faster
- C. Real-time collaboration with other agents or SMEs**
- D. Managerial chat monitoring

Real-time collaboration with other agents or subject matter experts is the capability described by the Configurable Workspace sidebar that speeds up case resolution. This feature lets you quickly bring in the right people, share context directly from the case, and get input or approvals without switching tools or waiting for email threads. You can tag teammates, loop in SMEs, and co-create responses or next steps in the moment, which reduces delays caused by handoffs and back-and-forth communication. While having quick access to case details or response templates can help, they don't by themselves accelerate resolution the way being able to collaborate live does. Managerial chat monitoring is about oversight, not speeding case fixes.

Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

<https://cisasm.examzify.com>

We wish you the very best on your exam journey. You've got this!

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