

Build organizational support for enterprise services transformation

Accelerate your enterprise service adoption

What's in this Success Playbook

This Success Playbook provides effective methods to gain support, sponsorship, and, ultimately, adoption of enterprise services among business partners and executives beyond IT, by showing you how to:

- Understand your partners' business challenges and how they can be addressed with enterprise service management (ESM)
- Identify the targeted use cases tied to business priorities and make them tangible through prototypes, proofs of concept, and pilots
- Make your organization aware of your successful ESM initiatives to gain support from executive sponsors and increase demand across the enterprise

Companies that experience success running IT service management (ITSM) using the Now Platform® often look to expand the use of service management into areas of the organization beyond IT—specifically into enterprise service management (ESM). When you establish ESM, apply IT's best practices to the enterprise services you deliver across the organization.

Keep in mind that, as a Now Platform owner, you may struggle to gain the support you need to expand the use of services across your organization. This often happens when business partners and executives outside of IT have less experience with service management and don't fully understand how services can support their business priorities—and because of that, they don't see the value enterprise services can bring to their businesses.

Key takeaways

The most important things to know

- Work on two-way education with business partners to identify potential enterprise service opportunities you can implement using ServiceNow®.
- Build and run pilots to create a groundswell of support from your partners and to convert them into change agents—then use those success stories to promote additional enterprise services.
- Once you gain executive sponsor support, invest in a global ESM Center of Excellence (CoE) to scale and sustain ESM.

The payoff of getting this right

With effective methods for gaining support and sponsorship for enterprise services, you can significantly expand the value that ServiceNow brings to your business partners and executives beyond IT.

What you need to get started

Prerequisites

You need a general understanding of enterprise service management (ESM).

Playbook overview

ServiceNow recommends a four-stage journey to accelerate support for ESM adoption. Follow these stages for recommended actions and how-to guidance:

Stage 1 – Extend support for enterprise services

Stage 2 – Execute on service opportunities

Stage 3 – Drive awareness to gain sponsorship

Stage 4 – Scale and sustain ESM

Terms and definitions

Enterprise service management (ESM) – The extension of service management principles to offerings outside of IT (e.g., new employee onboarding)

Enterprise service – An enterprise offering that delivers on an employee or customer demand and that has four elements:

- A point of engagement, through a portal or catalog
- A transaction that's requested through the engagement (e.g., requesting a laptop)

- A workflow to deliver against the transaction (e.g., a provisioning process)
- Information that helps the employee or customer make an informed decision, address an issue, and monitor the transaction

Some examples of services include:

- HR, employee onboarding – An orchestrated process of helping a new employee join an organization and become productive quickly
- Procurement, vendor onboarding – An orchestrated process of bringing on a new vendor that the organization will do business with
- Facilities, maintaining buildings – Managing incoming requests for maintenance

Business outcomes – Stated objective(s) or goal(s) with achievement outcomes that can be clearly identified using quantitative and/or qualitative data

Business partners – Cross-functional leaders outside of IT who are typically at the director level or above

Change agents – Stakeholders who have become your ServiceNow champions and who will support and convey your message on enterprise services

Experience – Includes both interactions and transactions and could refer to both employee and customer experiences (EX and CX)

Governance – The set of policies, processes, and organizational capabilities that define how decisions are made and who is responsible for outcomes; additionally, you need it to realize value and transform your vision with ServiceNow

Organizational change management (OCM) – Set of practices conducted before, during, and after projects that are used to identify and manage the challenges, pain points, and risks associated with making changes in how your organization functions or is organized

Pilot – An initial rollout of a software use case, targeting a limited scope of the intended final solution; used interchangeably with “soft launch”

Proof of concept (POC) – A small exercise to test a discrete design idea or assumption that determines a solution's viability

Prototype – Simulates the full solution or, at least, a relevant part of a solution

Value – The difference between perceived benefits and cost is expressed by:

- Value = Benefits minus costs
- Value = Benefits and costs
- Cost is what you pay, and value is what you get

Stage 1 – Extend support for enterprises services

Engage in a two-way education with partners to discover potential use cases for enterprise services.

KEY INSIGHTS

- Understand your partners' challenges, objectives, and vision to identify potential enterprise services.
- Educate selected partners on ESM basics while exploring and vetting potential use cases.
- Entice partners to start asking about potential use cases and pilot activities.
- Identify the use cases for enterprise services.

"If the rate of change on the outside exceeds the rate of change on the inside, the end is near. "

– Jack Welch

This stage describes the people to engage who can expand your support for enterprise services, how to prepare for your discussions with them, and what a good conversation with these business partners is like. Education is the name of the game here: You're learning about the business and the business is learning about the capabilities you can bring to the table.

Your role

As they try to gain support for enterprise services, many Now Platform owners find that their role is less that of a technologist and more that of a teacher and advisor. That requires collaboration and coordination across business functions (not to mention leadership buy-in).

You're teaching your business partners a new way of thinking. Change management will be a key obstacle as you go through this journey, but if things go right, your business partners can become change agents for you. What you most want to discover are the best opportunities for quick ESM wins.

How to talk about ESM

You already know ESM can provide extensive benefits to your business partners, so now is the time to target partners and perform some education. When you describe ESM in the context of the Now Platform, you can provide real business value for partners.

Top 10 ESM benefits for business partners

1. Improved efficiency and reduced operational costs
2. Self-service efficiencies and workload reductions
3. Increased control and monitoring
4. Improved effectiveness
5. Improved visibility into operations and performance
6. Better service delivery and employee and customer experience
7. More effective communication
8. Increased accountability
9. Improved integration capabilities
10. Improved collaboration within and across business units

Follow this basic framework when you describe ESM (based on our Success Playbook on [how to launch digital business services](#)):

1. To provide a service, you first must have a single system of engagement for common, repeatable use cases.
2. Next, create a single system of action (or workflow) so you can deliver on those use cases in a standard, consistent, and automated manner.
3. And finally, create a system of insight that allows you to track performance. This gives you what you need to make continuous improvement or adjust your service when your business needs change.

Once you show ESM to your business partners through this lens, through the context of their area of ownership, they should be able to have the “aha moment” necessary for them to identify relevant use cases. As an added bonus, describing ESM in this way keeps it from being theoretical.

Promote a two-way education on business priorities

Engaging with business partners needs to be a two-way educational experience. It's important to educate them on the power of ESM. But you need to ground that conversation in the challenges your business partners are facing—and on how you can help solve those challenges with enterprise services using ServiceNow.

Ask your business partners about their challenges, and then respond with a baseline education on what enterprise services can do to solve them. Through this two-way education, you'll gain interest from your partners as well as insight into potential opportunities for services.

Step 1: Know your business partners

When you're ready to engage, seek out business partners who own potential use cases for ESM. Table 1 provides a list of business partners with guidance on what to ask about to discover potential use cases.

Before you get to the additional questions in the table, ask each type of business partner you've engaged these general questions so they can help you start formulating the ESM use cases:

- How do requests for work come into your department?
- How does your department track and manage work requests?
- How does your department assign work requests?
- What are the key measures your department uses to assess operational performance?

After asking these initial questions, use the table to drill down into more specific questions to ask.

Business partner	Titles to engage	Primary business challenges	Additional questions
Human resources (HR)	<ul style="list-style-type: none"> • VP or director of HR • VP or director of shared services 	<ul style="list-style-type: none"> • Improving employee experience • Improving employee satisfaction • Retaining employees 	<ul style="list-style-type: none"> • How do employees get what they need from HR? • How long does it take to onboard or offboard an employee?
Customer service, customer support	<ul style="list-style-type: none"> • VP or director of customer support • VP or director of client services • VP or director of customer success 	<ul style="list-style-type: none"> • Improving customer experience • Improving customer satisfaction • Retaining customers • Increasing support revenue 	<ul style="list-style-type: none"> • How do your customer service agents manage inquiries? • How are you managing omnichannel access for your customers? • How long does it take to onboard a new customer?
Procurement	<ul style="list-style-type: none"> • Director of purchasing • Global procurement manager 	<ul style="list-style-type: none"> • Acquiring accurate data • Reporting 	<ul style="list-style-type: none"> • How do you manage vendor onboarding and offboarding? • How do you track service catalog requests?
Facilities	<ul style="list-style-type: none"> • Director of facilities 	<ul style="list-style-type: none"> • Tracking assets • Meeting compliance standards • Tracking facilities requests 	<ul style="list-style-type: none"> • How do you track assets? • How do you handle facilities requests?
Finance	<ul style="list-style-type: none"> • VP or director of finance 	<ul style="list-style-type: none"> • Streamlining processes • Real-time visibility 	<ul style="list-style-type: none"> • How do you handle requests for ad hoc financial reports? • Do you orchestrate financial period closing?
Legal	<ul style="list-style-type: none"> • General counsel • Associate general counsel 	<ul style="list-style-type: none"> • SLAs • Increasing productivity 	<ul style="list-style-type: none"> • How do you handle work requests? • How do you handle workflows?
Sales and marketing	<ul style="list-style-type: none"> • VP of marketing operations • VP of sales operations 	<ul style="list-style-type: none"> • Automating work requests 	<ul style="list-style-type: none"> • How do you handle work requests for creative services? • How do you handle work requests to route sales contracts?
Security	<ul style="list-style-type: none"> • Director of technology • Head of application security • Security systems administrator 	<ul style="list-style-type: none"> • Increasing security incident response speed • Increasing vulnerability response speed • Maintaining GDPR compliance 	<ul style="list-style-type: none"> • How do you connect security and IT teams? • How do you respond to a security breach? • How do you manage data protection?

Table 1: Business partners to engage with and their primary drivers

Regardless of the business unit, there are other ways to determine if a business partner's department can benefit from enterprise services. Here are some criteria to help you determine if enterprise services are justified:

1. The business functions in a shared services model.
2. The business receives work requests through a number of sources.
3. The business is unable to manage the priority and service level agreement (SLAs) for work requests.
4. The business needs a better way to track work requests and manage them through various stages of a lifecycle.

5. The business has to refer to data in multiple tools or systems to properly fulfill a request.
6. The business needs a better way to report on the work it does to demonstrate value to the organization.

EXPERT TIP

Identify interested business partners with high transactional businesses who are already devoted to service improvement.

Step 2: Do some homework on your business partners

Once you know your partners, perform some additional homework to learn more about them. Learn about their business line and function, common language and concepts, systems they use, and maturity and business priorities.

Doing this will make your engagement with each partner more effective and impactful. To be fully prepared, complete this list of homework activities:

1. **Activity** – Review and understand your company's mission and vision

How – Read the company financial report and look for details on a company strategy you can target (i.e., digital transformation or process automation).

Why – This provides insight into the company strategy, which helps you determine how ESM use cases can support the strategy. In addition, aligning with business goals often results in more traction and leadership buy-in.

2. **Activity** – Get access to user data and opportunities to streamline

How – Get access to secondary data, such as common complaints by employees within the organization, to demonstrate how ESM use cases can provide value. For example, in many organizations, the employee onboarding process is poor because it's typically manual. It's a slow process to get an employee ready to work, creating a poor experience for new employees.

Why – To help pinpoint enterprise service opportunities, you must understand your partners' business challenges and the metrics they care about. This is also an opportunity to discover data sets that may already be tracked and managed within ServiceNow. In some instances, it provides an opportunity to eliminate an existing integration or manual process.

3. **Activity** – Review financial data

How – Ask your business partners and finance if they're willing to share their business unit's P&L statements.

Why – This information will help you understand your partners' financial model (revenue and cost).

4. **Activity** – Perform interviews or surveys

How – With prior permission from your business partners, perform interviews and/or surveys with those in the fulfiller role to understand existing processes and any challenges that users face today.

Why – You'll use this information later to understand use case opportunities for enterprise services.

5. **Activity** – Determine current systems in place within the business unit

How – Inventory what systems are in place:

- Applications (i.e., SharePoint, ERP, CRM, or others)
- Media (i.e., on premises, cloud, mobile, or others)
- Usage, costs, and contract renewal timing

Why – This inventory helps you identify opportunities to condense the number of tools used to perform a task. Plus, knowing the cost of licensing and maintenance of other tools will provide insight into the ROI after shifting to ServiceNow.

6. **Activity** – Research industry trends by business area

How – Find industry sites, blogs, and journals, and read up on the how the business operates, its challenges, its current and future trends, and what its competition is doing. Take note of the industry language used.

Why – Learning a partner's industry language allows you to speak from their point of view.

EXPERT TIP

Be selective early on about the partners you choose to target. Look for those who will embrace a new way of thinking and be your change agents in the future.

Step 3: Meet with your business partners with two-way education as your goal

Once you've completed your homework, you're ready to meet with business partners. Ask for a meeting and prepare yourself for the discussion. The goal of the meeting is to learn more about their business and articulate how enterprise services can help meet their business needs.

The homework you performed ahead of time will help you be prepared to ask relevant questions and have sufficient context to understand your business partners' point of view. With the right conversation, you can generate interest from business partners, and that will lead to potential use cases for enterprise services.

Use these three tactics to run an effective meeting with your business partners:

1. **Use your partner's business terms** – It's common for different areas of an organization to refer to certain terminology in different ways. Terminology between business units varies, so you'll need to do a translation based on the business unit. For example, HR calls a work request a "case," but IT calls it an "incident." Make sure to use the terms your partners will understand while conveying what ESM can do for them and how it can support their business priorities. Again, the goal is to get them interested in use cases with service opportunities, but they need to understand what you're talking to them about in their terms. A quote from one ServiceNow customer summarizes this point: "Every single one of your conversations has to be framed in the language [used by] the business that you're speaking with."
2. **Ask leading questions** – Your goal is to start validating your business partners' most important challenges and objectives. Ask questions like:
 - Given the CEO's priorities for...—and given your stated objective...—what ties those priorities and your objective together in your mind?
 - Given what I know (or heard), your priorities are... Which of these things is most getting in your way?
3. **Ask questions in a way that earns trust** – There are some categories you can ask about, but the way you ask the question is really important because your phrasing will tell your partner immediately whether or not they'll trust you. Make the conversation about how you can help them. Avoid questions that point out the negatives the partner already knows unless you're bringing them up to provide solutions. Ask partners about improving the employee experience. You might say, "Here's what I heard so far about your employee experience—do you agree with that?" Or provide a quick summary and ask, "What am I missing?" Show what you already know and ask them to fill in the blanks rather than saying something like, "Tell me what your strategy is." Get them on your side so they start thinking "Hey, this person may be able to do it." The way you ask questions is powerful in gaining business partner support.

Heads up!

Don't get too lost in service management jargon, especially as it relates to IT. Rather than dwell on terms like "system of engagement" and "system of action" (or assume that business partners know what these mean), use simple language to describe how a business service works. For example, you could say "Our technology will let you create a standard touch point with employees or customers so they can make a request, like onboarding a new employee."

Follow this advice when you interview your business partners:

- Come with prepared questions. For sample questions, read the Now Platform owner interview guide part 1 (two-way education).

- Come with a prepared statement of what you think they do or need based on your homework.
- Don't overlook the importance of learning about what your partner does or needs. Let them educate you on what they do. But also aspire to end the meeting with a sense of the potential use cases you can build business services for.
- Before you offer solutions, take notes on what the partner says and build a better understanding of their needs. Try to start visualizing the big picture, then provide solutions.

Now Platform owner interview guide part 1 (two-way education)

Use this guide when working with your business partners.

Let them educate you on what they do. Ask:

1. Who are your customers? What group or industry do you serve?
2. What are your business priorities? (Tailor this question to the business challenges listed in Table 1.)
3. How do you measure and track your success?
4. How do you access your reports and dashboards on your business productivity?
5. What is your vision for the future of your business?

Key tips to keep in mind:

- Avoid IT-type talk.
- Speak from their point of view.
- Use their business terms.
- Tie your replies to ESM capabilities.

Frame the enterprise services opportunity

As you start to learn about your partners' business challenges, take the opportunity to pitch how ESM can help them. You don't have to get into the minutia of ESM—instead, lead with representative examples of use cases from another business unit or company in the same business function.

Here are the key points you need to drive the conversation with your business partners followed by why they're important:

- **Position ESM as an enterprise initiative, not an IT-only initiative** – Make it clear that services provide a companywide or global solution and benefits not just an IT solution. If you already have executive sponsorship, try to use it in your messaging.
- **Provide the value proposition of ESM** – Use ESM as a means for your business partners to manage complexity while improving efficiency and speed.
- **Promote the benefits of process automation** – Talk about how the Now Platform can make your partners' processes more effective and efficient.
- **Demonstrate the achievement of digital transformation** – Show your partners how ESM can help them realize their digital transformation goals and take advantage of the latest technologies, like AI. Read what Ventana Research has to say about digital transformation:

“By 2021, only 50% of organizations will have transformed their business processes to be more intelligent and automated by embracing digital technology. There are a number of critical digital technology innovations that your organization should consider as part of any new investments to ensure that you are gaining ground in the seismic shifts in computing. Organizations that don't do so risk missing out on opportunities and being left behind by competitors.”

– Ventana Research

- **Promote benefits and outcomes** – Talk in terms of benefits and the business outcomes your partners can achieve.
- **Use business metrics** – Strengthen the value of ESM by providing examples of value delivered by other business units from past deployments, including financial gains or savings, increases in customer and employee satisfaction, and reduced risk. For example, our customer service team's Net Promoter Scores increased by 40 points after they implemented ServiceNow Customer Service Management to manage its inbound cases. Use the [ServiceNow Value Calculator](#) to help support your business value calculations for EMS.

You may be excited to talk to your partners about ESM and the Now Platform, but reposition it to their point of view and what really matters to them. Pivot and make it all about them, and at the end of the day, you'll have the solution.

EXPERT TIP

You may need to build up your credibility with your business partners. To do this, you can:

1. Practice your conversation with mid-level managers so you can get to know the function before you pitch to the head of the function—you only get one shot at a meeting like that; and
 2. Show how ESM has transformed IT along with the measures that prove that transformation. Go in from a position of strength.
-

The customers quoted next provide valuable insight into how you can show business partners the value of ESM.

“Bottom line, most companies look into growing revenue. I’ve been in too many conversations where you tell them it will cost \$50K+ to stand up the new process, which could scare them off. But if you can show them the model for how you will recoup and what the new process will help you save, it’s a different conversation.”

“Often, I ask my partners, ‘How do you prove when your team is overworked and needs more headcount?’ I tell them the only way to get the analytics they need to track productivity, such as through email, is to digitize your work.”

“The most important thing is to make the conversation about how they work and how we can make their processes better and easier for everyone.”

“Your partners don’t need to know anything about the details of the technology. They don’t want to know about the bits and bytes. Talk to them about how you help them get work done faster and in easy terms.”

– **ServiceNow customers**

Your pitch presentation

When you pitch to your business partners, create an introduction presentation with a few slides to demonstrate how ESM can help them. Check out our [Introducing ServiceNow and Business Value](#) presentation on the ServiceNow Champion Enablement™ site. Figure 1 shows an example

of a “strategy on a page” so you can see how you might transform some of your business partner’s current processes.

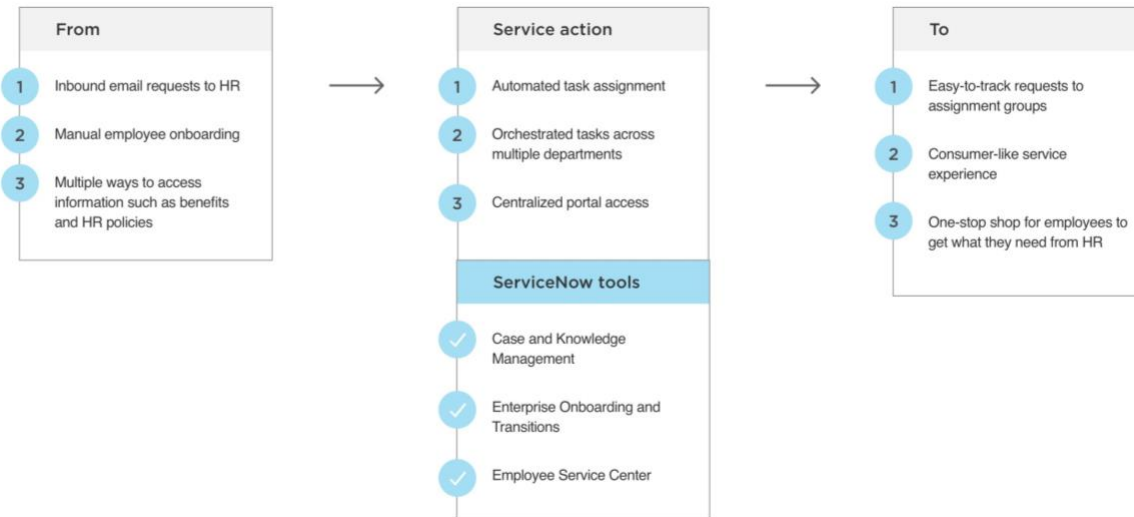


Figure 1: Strategy on a page to use with an HR business partner

EXPERT TIP

After you’ve had three or four conversations with your partners, assess how much organizational change management you will need to invest in across your journey with them.

Use ServiceNow and other resources

You’re educating and pitching to your partners, but you should also use outside resources with expert advice. ServiceNow offers many resources to help you on this journey:

- **Champion Enablement:** Champion Enablement is a self-service educational resource available to all customers and partners. It provides support in these key areas:
 - [Plan your communications and training](#)
 - [Strategic program governance](#)
 - [Introducing ServiceNow to your enterprise](#)
- **ServiceNow User Groups (SNUGs) – SNUGs** allow ServiceNow customers to interact with other customers in their local community. Many times, Now Platform owners will bring their business partners to these meetings to broker conversations with customers in similar business areas and discuss how they’re using ESM tools.
- **Knowledge conference and Now Forums** – Like SNUGs, these events are also mostly led by customers and you can bring your business partners to them. These events will allow your

business partners to see the latest product demonstrations and interact with peers in their field. Here are a few customer quotes from our recent Knowledge conference.

"We know ServiceNow is primarily an IT product but it was eye-opening to see how much HR was represented during the conference and how many HR customers attended."

A customer initially texted the company admin saying, "I know these conferences are all sales focused and showing products that never quite work the way they are demoed." On day two of the conference, his text to the admin said, "I was wrong. I drank the Kool-Aid and I love ServiceNow!" He came back excited with a long list of ideas to explore further.

- **ServiceNow account team** – Your account executive and solution consultant partners will help support you when you engage with your business partners. ServiceNow customers will bring the ServiceNow team into the conversations to give product demonstrations and, most importantly, talk about how other customers use enterprise services in their functional areas.
- **Other resources** – Use other outside resources and look for articles on digital transformation (if possible, find resources specific to your industry). Check out some of the articles posted under the related resources section of this playbook, and send them to your business partners or incorporate them into your pitch deck.

EXPERT TIP

Use the [ServiceNow Community](#) to understand and communicate best practices other organizations are using in enterprise service management.

Step 4: Identify and capture use cases

Your conversations with business partners should generate potential leads for use cases that you can prioritize for development. Coming out of your conversation, document the pain points you heard and diagnose whether a service management approach can resolve them.

Use the two tactics and their actions listed here and part 2 of the interview guide to help you perform the interviews:

- **Identify pain points** – Inquire about pain points that directly speak to the benefits of enterprise services. Also, try to take a clean slate approach. Your business partners may tend to talk about existing broken processes or legacy processes that are working but are still very manual. Steer them toward a green field of opportunities to explore. Key questions include:
 - What are the elements of your processes or capabilities that are the most manual and inefficient?

- What workflows are critical to business success?
- What tasks are repeatable, such that if automated will help you free people up to higher-level tasks?

Pain points are often associated with lack of visibility, lots of “swivel chair” activities (i.e., switching between systems), and employee or customer complaints.

- **Perform a diagnosis** – Focus on solving problems that your partners really care about. If you can solve a problem for your partners that is critical to their success, you will really get their attention.
- Think about what you could digitize to add value, or save, on common manual tasks.
- Ask probing questions to discover where automation can add meaningful business value.

Now Platform owner interview guide part 2 (use cases)

Use this guide when working with your business partners.

Identifying potential use cases:

1. What are some of your most redundant and manual processes?
2. What processes do you handle by email? How many team email boxes (e.g., customerservice@yourcompany.com) do you have?
3. How are you notified when key events happen over the course of business?
4. Can you walk me through your current processes today?
5. Is there anything in your current processes you think is missing?
6. What are the different roles that interact with your processes?
7. Do you have to manually dig for data somewhere, such as in another system?
8. Are there any elements of the process that are considered “busy work” and could be automated?

"I went to the general counsel (GC) and asked him to 'tell me about your services.' GC said we don't do services, we do stuff. Then I asked him to tell me what are all the GC mailboxes he had that don't go to an individual. I found out there were six that managed processes like NDA review and contract review. Email domains like these offer a proxy for the services that any group offers."

– A ServiceNow customer

EXPERT TIP

The best initial ESM opportunities are simple, quick wins that don't require a lot of organizational change management.

Stage 2 – Execute on service opportunities

Pilots can be one of your most valuable tools in gaining partner support—and you can ensure the excitement becomes infectious.

KEY INSIGHTS

- Build and run two to three pilots to create a groundswell of influence and support.
- Capture the pilots' success stories to use as references to gain sponsorship.
- Generate excitement by sharing the successes of other pilots with partners.

“Having a digital strategy will soon look as ridiculous as having an electricity strategy.”

– Kay Boycott, CEO, Asthma UK

Once you've engaged your business partners, your focus should be on capturing opportunities and deploying POCs and pilots to demonstrate the value of ESM. You should plan to use initial use cases as showpieces to gain broader enterprise support. Identify a couple of opportunities, dig deep into those opportunities, then extend them into other areas of the enterprise. POCs, prototypes, and pilots

To gain support for enterprise services, you must generate a track record of demonstrable, tangible success. You can create a groundswell effect when you show value through a pilot based on a use case you've identified with one or more of your partners.

Before you start bringing the use cases to life, you may need to explain to your business partners the difference between a POC, prototype, and pilot. Use these definitions to help you explain:

- **Proof of concept (POC)** – We perform an isolated exercise with limited functionality. It might be a rough visual interpretation of the service.
- **Prototype** – We simulate the whole service.
- **Pilot** – We create the full service and present it to a subset of the audience that will use the service.
- **Production** – We make the full service available for all its consumers.

Step 1: Develop a POC and prototype

Once you've identified use cases with your business partners, work with them to decide which to turn into a POC and/or prototype. Remember to look for the simplest and easiest use cases to implement that also have the potential to demonstrate high value. A POC that doesn't drive some meaningful impact isn't going to help you gain support.

Show them art of the possible

Without getting into initial requirements, you can demonstrate the immediate value of ESM by showing the prototypes you create during your first discussions with business partners. But proceed with caution and use your homework to make sure you have the applicable use case to show them. Keep it simple and relevant. An off-base example could put your business partners off.

Here is some expert advice given by some ServiceNow customers for taking this approach.

"When meeting with business partners, sometimes you need to make an immediate impact on them and push past the whiteboard. During the meeting ask them about some data they need to track, and then throw the fields on a form to demonstrate instant benefits."

"Many times, business partners may be resistant to change even after the pitch. In this scenario, ask them to send you their SharePoint sites or paper forms and then deliver back these forms within ServiceNow but with actionability, workflow, and reporting. They're usually blown away by the difference."

"Show simple functionality like automating an email communication, survey, or generating a dashboard or report. These simple things will help your partners visualize ESM's benefits quickly, and they often realize how little effort it will take to incorporate ESM in to a process."

"An impactful way to show immediate value is to prepare a service prior to meeting with your partner. Then, during the meeting, ask your business partner to send an email to a designated email address with a specific tag in the subject line. They can see how quickly it goes from their computer to an incident that's already assigned to the proper group and category, shown by a

confirmation email that arrives in the partner's inbox in seconds.
Show the fulfiller view of the service in ServiceNow as well."

– ServiceNow customers

Approach POCs and prototypes carefully. Don't build without a clear, precise understanding of your partner's use case. (Refer back to Stage 1 if you need more guidance.)

This ServiceNow customer's story demonstrates the art of starting off on the wrong track but getting it right in the end. The project involved working with HR to allow managers to onboard contractors into the system. Here's what happened.

The story

The requirements for the project came to the team through a business analyst (middleman) who was causing a lot of churn. No one on the technical team had reviewed the requirements.

The original development to build the POC took over 200 hours. Once HR saw the POC, though the solution was what they asked for, they realized it wasn't going to work.

During the demo, a member of the technical team bounced some ideas off the HR team, asking questions like, "How is the business using this data? Is there data we aren't already gathering or data already in the system we can use?" HR didn't include questions around notifications in their original requirements or around the timeliness of certain things.

The next day, the same technical team member spent about six hours mocking up what he thought was needed. He set up a meeting to show the new solution, and it was exactly what HR wanted.

The result was over 200 hours of deleted work and having to start from scratch. To create exactly what HR wanted took 30–40 hours.

The lessons they learned

1. Bringing in technical resources late in the game and viewing those resources as technical only and not as people who can contribute to the design can cause the project to fail.
2. Even in the initial ideation phase, investigating ServiceNow as a solution and including someone with an engineering or architecture background could create an opportunity to use work already being done in other business units.

3. Reusing work created for another project saved the team time. They also over delivered because they reused work to complete their phase 2 goals quickly.

EXPERT TIP

When you create POCs and prototypes, apply consistent design principles from the beginning. Include concepts of human-centered design and design thinking strategies upfront.

Step 2: Run pilots

After a successful POC or prototype that your business partner is happy with and has signed off on, run a pilot program (also referred to as a beta test).

Your team will then develop the requirements from the POC or prototype to bring to life the use case on the Now Platform. Running the pilot lets you roll out a new service in real-world conditions to a small selection of users.

Here are the steps to creating a successful pilot:

1. **Set clear goals for your pilot** – What does success look like? Make sure you have a clear picture.
2. **Keep the focus on usability** – Remember, people need to be able to use it to see its value.
3. **Get buy-in around the pilot's goals** – Work with your business partners to get buy-in before you start.
4. **Don't boil the ocean** – Start small by choosing what matters most. Go after low-hanging fruit.
5. **Understand your audience** – Make sure you account for all viewpoints.
6. **Think outside the box** – Use this as an opportunity to try something new that may eliminate some busy work or redundancy or provide more effective communication.
7. **Keep it simple** – Engineer for the 80% process and manage the 20%. Stay as close to out-of-the-box (OOTB) functionality as possible when you can.
8. **Decide on a bounded timespan** – For example, make it 14 days, 30 days, or longer.
9. **Choose your testing group** – Between 10–20 people is ideal.
10. **Develop a plan for onboarding** – Provide readily available resources and training.
11. **Get feedback** – Document what worked and what didn't.
12. **Review your metrics** – Use your metrics to determine whether you achieved your goal and why.

Avoid these pitfalls when you create your pilot:

1. **Reinventing the wheel** – Avoid recreating what your partners already have.
2. **Lack of collaboration** – Don't fall into the "us versus them" mentality.
3. **Lack of persistence** – Remember, it's more than "just a pilot."
4. **Scope is too narrow to succeed** – Though you're keeping things simple, don't limit your scope. If there are still tough issues left to solve when your pilot is complete, you need to expand.
5. **Treating it like business as usual** – Make sure your pilot is about a relevant use case that will truly benefit your partner.
6. **It loses momentum** – Don't let the pilot conclude before new behaviors become habits.
7. **It only works when things are slow** – If this is the case, you won't learn much and won't create believers.
8. **Abdicating responsibility** – Make sure your leadership voices confidence.
9. **Focusing solely on the fulfillment team** – When you neglect to consider how others outside the fulfillment group interact with the tool or process, they may be reluctant to use it.
10. **Focusing on engineering over process** – Often, teams will try to encourage an overly complex, overly engineered solution within the tool for a very obscure use case that could otherwise be addressed through a process.

Read these key customer insights related to running pilots.

"I wasn't really looking for success, I was looking for feedback."

"Get people from different segments of the company and at different levels of tech savviness. Encourage putting the squeakiest wheel on the beta group to get feedback early."

"In terms of our successes with running POCs and pilots, [we] were so successful at just showing the POC to users, getting their sign-off, then getting actual product in their hands quickly. The adoption and excitement was amazing."

"Define your team early to ensure clear roles and responsibilities are understood."

– ServiceNow customers

EXPERT TIP

As you build your requirements for a pilot, focus disproportionately on fulfiller (i.e., agent or rep) experience, since they will spend the most time working in the Now Platform.

Enable early consumerized experiences

When you run a pilot, make sure you enable the users to have a great experience while gathering important learnings from the project on your end. Include enablement tools such as:

- Baked FAQs including contacts, functionality to focus on, or anything important you want to learn from the pilot or that you need user feedback on
- User guidance, which can be as simple as pop-up messages with step-by-step instructions (This builds implicit user training.)
- Easy access to dedicated staff to support the pilot
- A satisfaction survey or interviews with users during and after the pilot
- Knowledge articles if you're using knowledge in the instance (Provide a simple info box with a link to a knowledge base article where applicable.)

Incorporate a consumer-like design early in your implementation journey. Promoting a great experience early on will help build your group of change agents (which you'll read more about in [Stage 3](#)) and address change management factors once you're ready for deployment and driving adoption. Also, focus on what the pilot missed. Conduct a "lessons learned" session after the pilot and incorporate the learnings into the production deployment.

Build a scorecard with your pilot results

Use a scorecard to help demonstrate to business partners the outcomes associated with the pilots you completed.

Use these metrics as part of your ESM performance scorecard:

- Any systems replaced and the costs, for example, "Replaced homegrown software and repurposed resources to work on the Now Platform"
- Time saved, such as "Reduced SLA by 40%"
- Productivity increased, like "Reduced HR cases by 50%"
- Tasks refocused more strategically, for example, "Turned email intake off and focused resource on knowledge creation"
- Any dollar value saved, such as, "Saved \$33,000 in Phase 1 (pilot), \$1.3m in Phase 2 as part of the global rollout"

- Increased employee or customer satisfaction, for example, “Improved employee service experience rated above 95% satisfaction rate by employees”

The Now Platform provides reporting tools (including Performance Analytics) to help you generate a scorecard and deliver visibility through dashboards. Critically, the performance scorecard should directly reflect the “pain points” behind your use cases, as defined by your business partners.

For more information on how you can gain insight into how ESM is generating value to meet business needs, read our Success Playbook on how to [baseline and track performance, usage KPIs, and metrics](#).

Heads up!

Don't wait to build your scorecard until the end of the pilot, and make sure it captures more than a single point in time. Add focal points showing updates across your pilot to demonstrate progress to your partners.

Create a library of success stories

As you build out successful use cases with your business partners, capture the details and lessons learned from your pilots in reference stories. This process is analogous to having case studies and references to use in the process of “selling” ESM to other business partners. Figure 2 shows a sample reference story (next page).

“Some groups are replacing an in-house system, [they're] so excited [about] what ServiceNow has to offer. Others [are] reluctant, happy using email and IM. They don't always understand the benefits right off the bat. Several people said, ‘I am not looking forward to using ServiceNow. I don't want to change.’ Then, after they get to use it, understand the value, they [say], ‘I get it and really like it.’ It's now part of our DNA.”

– A ServiceNow customer

EXPERT TIP

As far as “selling” ESM, the other business units, even IT, are your customers. Make sure you view, treat, and nurture them as such.






	Business issue	You're working through an HR transformation journey to standardize HR tasks, to-do items, and HR services. Your goal is to create a one-stop shop for HR transactions for employees and managers.
	Value drivers	<ul style="list-style-type: none"> • Make employees' lives as easy as possible. • Consumerize the employee experience. • Offer strategic capabilities to employees and managers.
	Outcomes	<ul style="list-style-type: none"> • Automated and standardized over 25 HR processes • Delivered metrics on accuracy, timeliness, and satisfaction to business leaders • Streamlined HR operating requests
	Processes powered by ServiceNow	<ul style="list-style-type: none"> • HR operating requests • A fully automated tuition assistance process • An additional 10 ServiceNow-supported HR programs
	Profile	<ul style="list-style-type: none"> • Over 40,000 employees • Large hourly workforce

Figure 2: Example of a reference story

Stage 3 – Drive awareness to gain sponsorship

Let the entire enterprise know how successful your pilot for a particular business unit was to create an enterprisewide buzz.

KEY INSIGHTS

- Promote your success through ongoing storytelling and public promotion.
- Create awareness of ESM success to generate excitement across the enterprise.
- Gain executive-level sponsorship to secure resourcing for ESM at scale.

“Change has never happened this fast before,
and it will never be this slow again.”

– Graeme Wood, Journalist

So far, you've discovered use cases with business partners (Stage 1) and created pilots (Stage 2). Pilots give you the opportunity to showcase your results and success stories and generate awareness of ESM benefits across the enterprise. Awareness comes in multiple forms, but the most important outcome is to create change agents who will promote the ESM message and influence peers. Through awareness and influence, you'll gain support from executive sponsors, and that will help you secure resources to expand the use of enterprise services.

Promote ESM success

Your goal is to build an ecosystem of change agents and executive sponsors across the enterprise.

Change agents – These are stakeholders among your business partners who can help drive the ESM message to the enterprise. They may have helped run pilots or reaped the benefits from pilots. They will “talk the talk,” spread the word, promote through “water cooler” chats, and help you reach executive sponsors in their respective business units.

Executive sponsors – You probably already have an executive sponsor for ServiceNow in IT, but your goal is to gain executive sponsors in other business units. For example, the director of HR may be a change agent who convinces the CHRO to support investing in ESM.

Remember, you'll be just as much a teacher and advisor as a technologist during this journey. This education will provide visibility and help generate demand for enterprise services.

Many customers will gain more influence by performing ongoing storytelling and education, publicly promoting and celebrating deployments, and using in-product functionality to advertise education events. Ideally, these events will show business partners you haven't engaged yet what's possible (from their peers) in terms of positive business outcomes and they'll come to you to learn more. For example, finance managers who were initially reluctant to consider ESM might reconsider once they learn about the results of your partnership with HR. Encourage your change agents to talk about and publicize success.

The [Champion Enablement](#) site is a great resource to get ideas and plans to market ServiceNow to your organization.

Gain support from executive sponsors

To scale and sustain support for ESM, you'll need multiple executive sponsors (and champions). To get these sponsors, you need to either allow your change agents to drive the business case upward, or you need to have a direct conversation.

When you have a sponsor's support, it means you have their commitment to the execution plan and roadmap. It also means you have funding for that executive's business unit, whether it's HR, facilities, finance, or another. And sometimes that funding comes in the form of a commitment to provide human resources rather than dollars.

As you gain executive sponsors, guide them on your expectations of their roles and responsibilities. You can expect your executive sponsors to:

- Lead strategic oversight of the roadmap for enterprise service management and ServiceNow
- Promote enterprise service management concepts to peers in other business units by talking about specific projects, successes, and the value they achieved
- Remove roadblocks and obstacles for Now Platform owners when needed
- Help identify opportunities to present enterprise service pilots to business leaders
- Help secure and commit resources for enterprise services

Even if you have executive sponsorship, it doesn't mean automatic adoption and value realization. A mandate still doesn't necessarily stop organizational resistance. To make adoption easier, you need to back up your sponsors and champions with a strong organizational change management plan.

This list of the common root causes of change resistance also defines the approach you should take to respond:

- **Competing business priorities** – Explain and show how ESM can support their current business challenges.

- **The reputation that ServiceNow is only an IT tool** – Show them how ServiceNow provides a platform with solutions that span across an enterprise not just IT.
- **Untangling a legacy process that users are happy with** – Explain that though sometimes change can be difficult, legacy systems aren't the best options long term. Show them how ServiceNow can scale over time.
- **Rebuilding a legacy process on the Now Platform is seen as too much effort** – Suggest starting with a clean slate, and focus on how they can optimize their processes more efficiently.
- **The business unit won't implement without heavy customizations, challenging your ability to upgrade and scale** – Focus on their business needs rather than on how ServiceNow might reproduce an existing process. For more information, check out the Success Playbooks on [customization pitfalls](#) and [upgrades](#) on the Customer Success Center site.

Multiple methods for driving awareness				
Success stories	Share the roadmap	Go-live celebrations	In-platform advertising	Companywide communications
<ul style="list-style-type: none"> • Resolve issues. • Show the value. • Discover the service offering's KPIs. • Discuss the ROI. • Use survey data. • Create case studies. • Use content in monthly newsletters. • Post infographics in hallways. • Present quarterly webinars. 	<ul style="list-style-type: none"> • Explain what's coming. • Show the value you expect and the issues you'll address. • Show the high-level expected go-live dates. • Explain where to find additional information. • Explain whom to contact with questions. • Communicate through multiple avenues. 	<ul style="list-style-type: none"> • Create a theme and make flyers and posters. • Ensure executive sponsors attend. • Invite employees. • Have it in a public space to attract passersby. • Hold a multi-location party. • Have a contest. • Serve a go-live cake. 	<ul style="list-style-type: none"> • Create knowledge articles for success stories and make them visible. • Post a calendar of upcoming events, go-lives, lunch and learns, and quarterly webinars. • Create a space for what's "coming soon." • Use social media and other communication tools. 	<ul style="list-style-type: none"> • Publish a quarterly or biannual webinar. • Send out a monthly or quarterly newsletter. • Create a video. • Publish case studies. • Hang posters, set up information tables, and hand out flyers. • Hold usage contests.

Figure 3: The ServiceNow Champion Enablement methods for building champions (Note: You must be registered on the Community site and an active ServiceNow customer to access materials.)

Heads up!

Education is a marathon, not a sprint. Back up your education by following through on the commitments you make to business partners.

Stage 4 – Scale and sustain ESM

Work with your business partners to create a future roadmap so you can increase adoption and manage organizational change.

KEY INSIGHTS

- Lay the foundation to scale and sustain ESM.
- Build a roadmap with your business partners.
- Invest in a global ESM Center of Excellence (CoE) to develop governance and sustain OCM.

“Encouragingly, customers often tell me that while their ‘operators’ once outnumbered their ‘transformers,’ the ratios are starting to reverse now that a service management installation is up and running.”

– Matt Denton, Sr. Director of Inspire at ServiceNow

This last stage is about scaling and sustaining your organizational support for ESM. You'll want to strive for higher end maturity over time. Take a look at the maturity model shown in Figure 4.

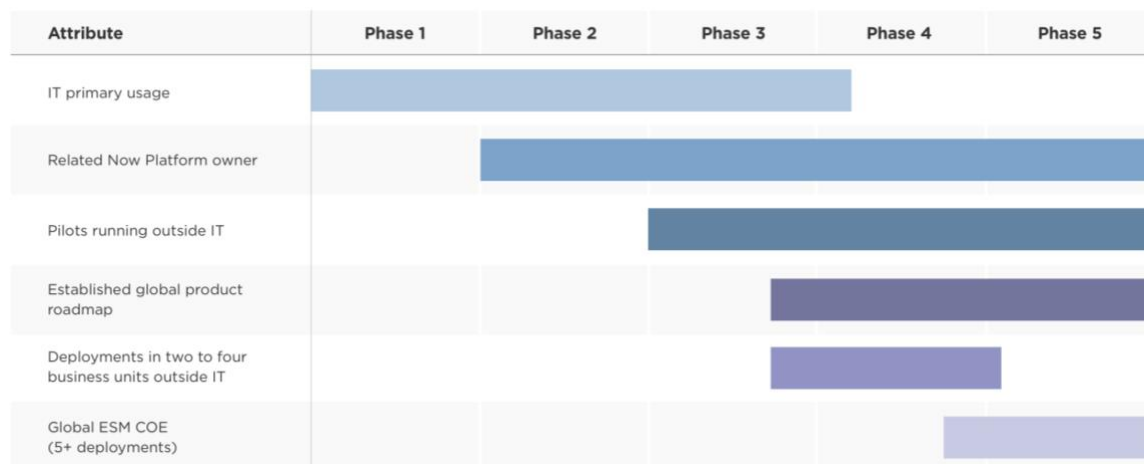


Figure 4: ESM organizational maturity model

Build a roadmap

As you deliver enterprise services to your business partners, you should create and communicate a roadmap that connects your ServiceNow implementation to ESM use cases. A [roadmap template](#) is available on the ServiceNow Champion Enablement site.

Consider these things as you build your roadmap:

- Depending on resource availability, you may have to deliver functionality in phases.
- Don't forget about [OCM](#). But be careful when you decide how you do it. You might overwhelm users with a big bang approach to launching a new service or set of services, but sometimes a big bang approach is exactly what you need. If you're replacing a legacy system with many steps that several groups use, providing training all at once can work really well if you design, plan, and execute it well.
- [Avoid heavy customizations](#) and use as much OOTB functionality as possible to prevent upgrade challenges.
- Use strategic [governance](#) to oversee the roadmap and associated resources. For example, use a Scrum framework to manage the roadmap.
- Manage your partners' expectations. As investments scale over time, you can deliver more functionality to your business partners. Don't say yes to every enhancement or new service, over promising what you can't deliver in a timely manner. This is a quick way to lose support.

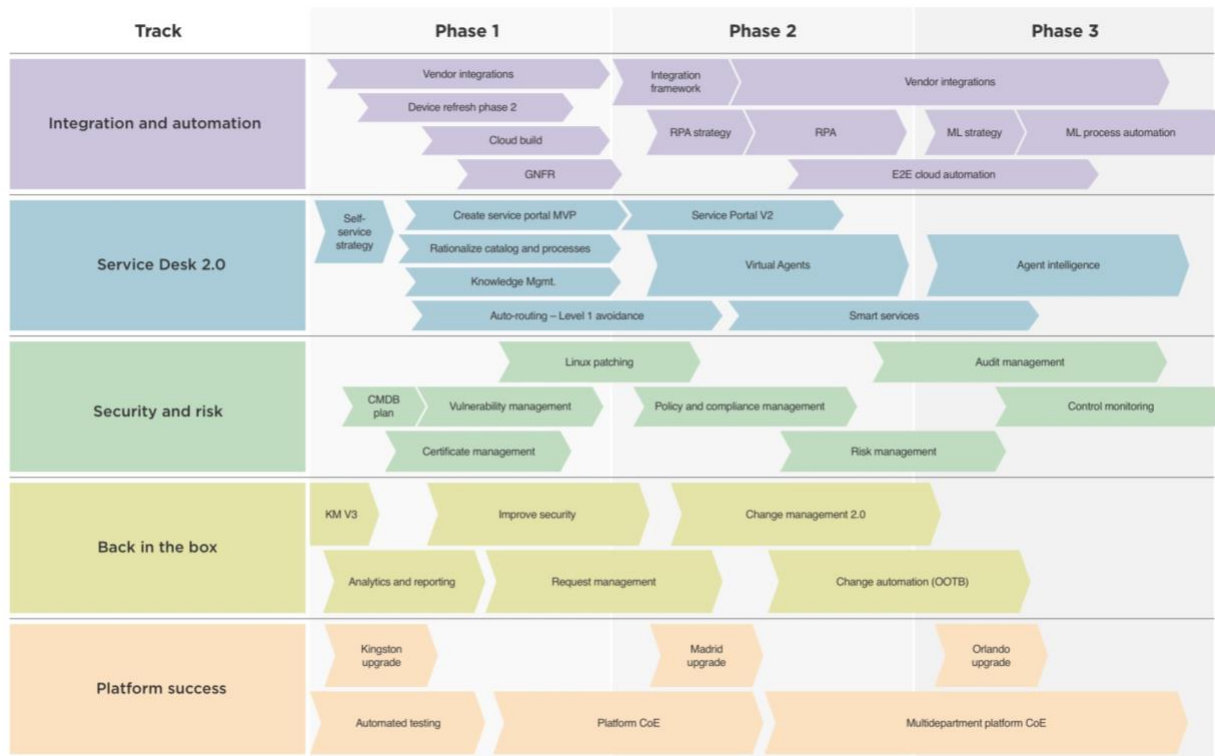


Figure 5: Example of a ServiceNow customer transformation roadmap (summary view)

Invest in a global ESM CoE

Once adoption of enterprise services starts to scale, you'll need a governing function to provide management oversight in the form of a global ESM CoE. Having an ESM CoE is ideal for fairly mature organizations, but if your organization is smaller, you can still apply the same principles.

Whether your organization is large or small, your ESM CoE should be your center of expertise for:

- Designing and launching enterprise services
- Managing ongoing education
- Managing use case development with partners

Include these functions in your ESM CoE, and define their roles and responsibilities:

- **Team** – Your ESM CoE should be a dedicated team. Ideally, the team isn't part of IT but includes IT staff. The team should focus on the Now Platform and enterprise services, including building a platform team with stakeholders from different business units to support multiple business unit processes and services.

- **Communications** – Provide announcements of new releases and ways to promote ESM to increase adoption. If possible, these communications should come from executives and internal customers.
- **Training** – Provide ongoing training to keep users learning and to create new change champions.
- **Product owner** – Manage incoming new requests and enhancements. The product owner should also analyze, scope, prioritize, and assign resources for those requests.
- **Development** – Include certified ServiceNow application developers to perform testing and release activities.
- **Maintenance** – Manage the operation of the Now Platform and upgrades.
- **Reporting** – Provide ongoing value metrics.



Figure 6: ESM roles and responsibilities (Source: "The Digital Enterprise Series – Part II – Enterprise Service Management")

EXPERT TIP

To scale ESM, maintain multiple business units with the same model, such as instance, SDLC, etc.

"Having a Center of Excellence in place with someone at the VP or senior director level is an important part to broader influence in the company, providing governance of ServiceNow and driving the expanded use of the tool for enterprise services. The CoE leader and team can help educate and define enterprise services for the organization and provide oversight on requests to fully understand how to best leverage ServiceNow."

– A ServiceNow enterprise retail customer

The takeaway

To accelerate the adoption of enterprise services beyond IT, you'll need to gain executive sponsorships throughout your organization. Executive sponsors hold the keys to the kingdom you'll need to expand your use of the Now Platform for ESM across your enterprise.

In order to get executive sponsorship, make sure you practice the methods in this Success Playbook to help you gain support from your business partners—they will help you build the business case. Here's a summary of those methods:

- Understand your business partners' key challenges while providing a baseline of education on ESM.
- Embark on a two-way education with business partners to identify potential enterprise service opportunities using the Now Platform.
- Build and run pilots to create a groundswell of support from your partners and to convert them into change agents, and then use those success stories to promote more enterprise services.
- Once you gain support from executive sponsors, invest in a global ESM CoE to scale and sustain ESM.

Appendix

Related resources

- [Champion Enablement communications and training](#) – Discover ways to spread your ServiceNow successes across your organization.
- [Success Pillars](#) on the Customer Success Center – Focus on the Success Pillars to get the most from the Now Platform.
- [The Top 10 Things to Get Right When Implementing an Enterprise Work Management Platform](#) – Read about the best ways to transform your enterprise through ESM.
- [Don't just run your business. Transform it.](#) – Find out how service management can transform multiple business functions.
- [Digital Transformation: How Is Your Organization Adapting?](#) – Manage OCM for digital transformation following these steps.
- [How to incorporate enterprise legacy systems into your digital strategy](#) – Find out how to build a hybrid system with new and legacy systems.
- [Enterprise service management: what's in a name?](#) – Change your ESM terminology for greater success.
- [Meet the CIO's new ally in digital transformation](#) – Keep employees on board by providing an excellent employee experience.