

Build your business case

What's in this Success Playbook

This Success Playbook will help you create a persuasive business case to get approval and funding for your ServiceNow investment. You'll learn to:

- Develop recommendations that align with your organization's strategic objectives and business issues
- Create defensible financial justification with quantified cost and expected benefits, using the best available data validated by the operators closest to it
- Communicate cohesive, concise value-for-the-business story tailored according to the audience.

Key takeaways

The most important things to know

When you create a business case:

- The process of creating the business case is more important than the actual numbers in the business case. The process allows you to get agreement on the problem you're trying to solve, identify and highlight a value gap, and then quantify it.
- The most persuasive business cases are cohesive stories that start with clear business objectives and challenges to resolve, are based on a comprehensive understanding of costs, and define credible measures of expected benefits and value.
- Along with the investment approval committee members, the stakeholders for your ServiceNow business case should include process owners, service owners, service desk managers, functional leaders, and everyone else who is a critical decision-maker in implementing and adopting the ServiceNow capabilities you recommend.

The payoff of getting this right

The business case provides justification for key business stakeholders and your investment approval committee to:

- First, approve funding for your ServiceNow relationship by showing that the investment provides a positive return
- Second, prioritize funding for ServiceNow relative to other projects by creating alignment with key strategic outcomes and building consensus with key stakeholders

A strong business case will help you expand your ServiceNow investment by building buy-in and enthusiasm among your key stakeholders and leaders. It also lays the foundation for tracking and managing value realization to build credibility and buy-in for future expansion.

What you need to get started

Prerequisites

Review any existing business cases associated with previous ServiceNow implementations and related enterprise systems, along with any documented lessons learned, if they're available.

Stakeholders

Identify ServiceNow champions within your organization that can help you advance the business case creation process.

When you should start this activity

You should create a business case every time you propose an investment in ServiceNow.

Playbook overview

ServiceNow recommends five steps to build a business case that will help you capture full value from ServiceNow.



Step 1 – Identify key issues and business improvement areas

KEY INSIGHTS

- Create your business case from the top down. Start with your vision for transformation and business objectives, and then define how ServiceNow can help you realize them.
- Discover your executive sponsor's objectives to ensure your business case aligns with them.

Good investments support clear business objectives. The first step in building your ServiceNow business case is to understand your organization's and key stakeholders' vision for transformation, and then state that vision in terms of clear and measurable business outcomes:

To do this, take two action steps:

1. Conduct background research.

Familiarize yourself with your company's strategic priorities. Look to your company all-hands events and earnings calls for insight into leadership priorities for the year. Identify key stakeholders—leaders of all teams and business units who are likely to use ServiceNow—to understand their goals and strategic plans.

2. Identify key issues and business improvement areas.

Conduct discovery sessions with your stakeholders to learn about their business goals, strategic priorities, and the challenges they face in realizing their goals. Learn what metrics—hard and soft—they use to measure progress against these goals.

Customer insight

ServiceNow's experience with customers points to one critical insight in your discovery process.

INSIGHT:

Follow a top-down approach, starting with your organization's most important strategic drivers and business issues

Your initial evaluation of ServiceNow may have stemmed from the need to replace an existing ticketing or case management system. But it's limiting to define your business problem in terms of system replacement, and it can cause you to have an uphill struggle with your investment committee. Your ServiceNow project will compete for funding, and it's likely that your investment committee will favor projects that help realize the organization's vision for digital transformation.

Best practice – Take a top-down approach to business case creation

Avoid defining your business case opportunity in terms of system capabilities and features. The best business cases take a top-down approach, one that starts with strategic drivers that define your organization's transformation vision as well as the business issues that are getting in the way

of realizing that vision. Business cases that solve those issues, with clearly defined outcomes, provide a stronger measure of value than cases that try to build from the bottom up, starting with capabilities and features. See Figure 1 for a comparison.

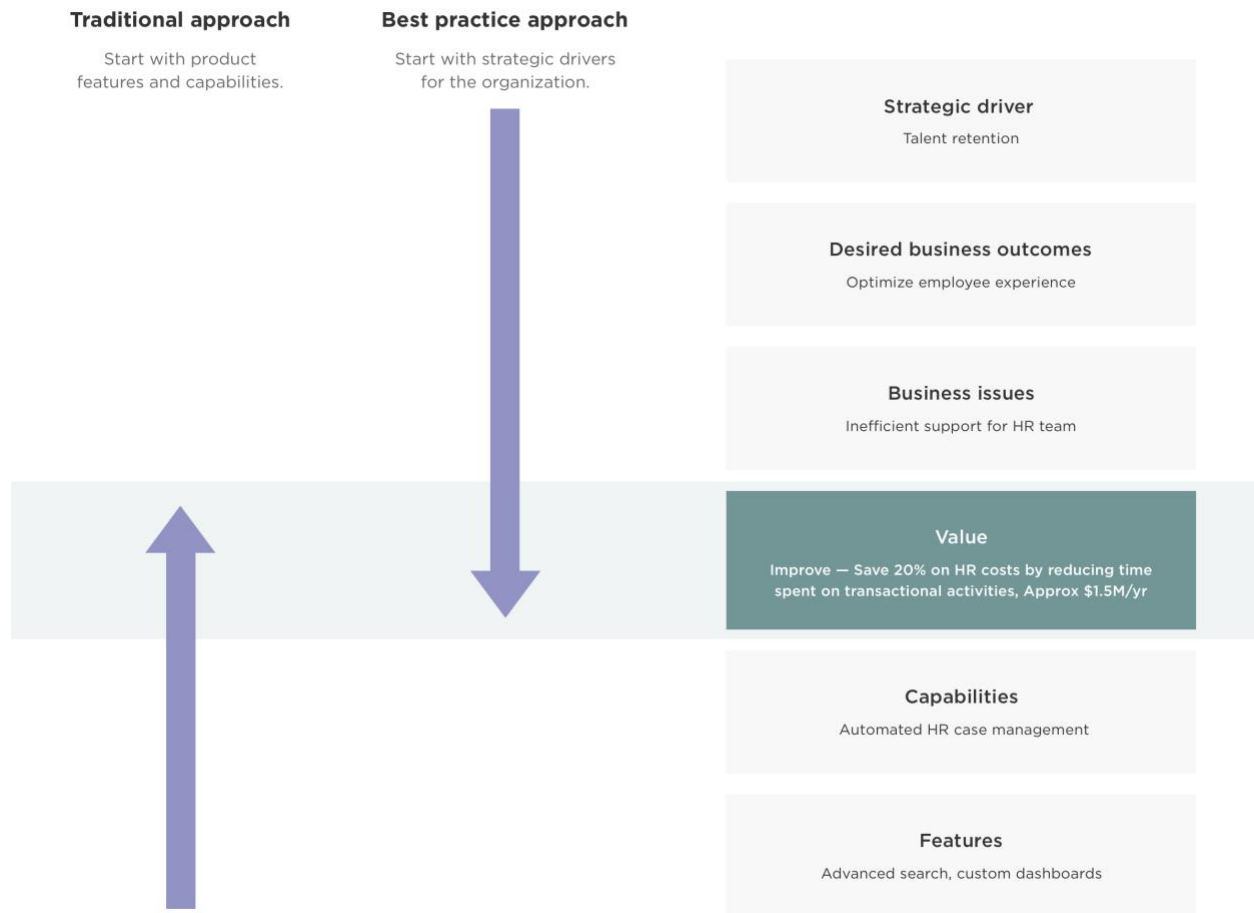


Figure 1: Comparison of top-down versus bottom-up approaches to business case creation

As you engage with key stakeholders for your initial research, clarify which strategic drivers are critical to realizing their plans for transformation as well as the business challenges to those drivers. Use these questions to get started:

- What are your most important strategic priorities and plans for the next five years?
- Example answer: *We want to grow our business globally and scale it to improve our competitive position in the market.*
- What business outcomes(s) do want to achieve?
- Example answer: *We want to reduce the amount of lost employee productivity due to IT support issues.*
- Why is this business outcome important to realize the strategic priority?

- Example answer: *We need a 2x improvement in employee productivity over the next five years to meet our targets for growth.*
- What obstacles do you currently face in implementing your strategic priorities and plans?
- Example answer: *Our service agents struggle to resolve IT support issues quickly because they are dependent on limited expert knowledge and have to navigate across multiple tools to resolve incidents.*
- What success criteria would show that we've accomplished the business objective?
- Example answer: *A 20% improvement in the average time taken to resolve IT support issues.*

EXPERT TIP

Usually there are multiple initiatives driving your strategic outcome. Know what these initiatives are so your recommendations can align with and support them to strengthen the business case.

Best practice – Focus disproportionately on your executive sponsor's objectives

The executive sponsor is the most important stakeholder for your ServiceNow business case. The executive sponsor sets the strategic vision for the investment and helps remove organizational roadblocks to value realization.

Your business case must align with the objectives your executive sponsor is personally accountable for. This will ensure the executive sponsor champions the business case and helps you secure buy-in for continuous executive sponsor engagement for implementation and supports value realization.

Best Practice – Use jargon-free language to identify new opportunities for business value

In your discovery sessions with key stakeholders, avoid focusing your conversations around technical features. Focus on identifying use cases and outcomes that are necessary to create business value.

EXPERT TIP

Often, the problems you identify are going to be interrelated and shared across stakeholders. Ensure you understand the drivers and root causes of the problems your stakeholders describe, so you can define mutually exclusive and collectively exhaustive (MECE) patterns.

What to do next

With a good understanding of the strategic drivers that define your organization's vision for transformation—and of the business problems that hinder them—you're ready to evaluate ServiceNow's products and capabilities and develop business case recommendations.

Strategic drivers may change based on changing market forces and your business strategy. As such, repeat this step:

- Annually, to validate the business problems you need your ServiceNow implementation to solve
- Every time you propose to implement a new ServiceNow capability

Re-engage with business stakeholders frequently to discover new opportunities and highlight the value you realize with ServiceNow.

Step 2 – Develop recommendations

KEY INSIGHTS

- Collaborate with stakeholders to identify relevant ServiceNow products and capabilities to implement, and define the level of support required for successful implementation
- Ensure your recommendations reflect a phased approach to implementation

Once you have a clear understanding your organization's strategic drivers and business issues, you can begin identifying relevant solutions from ServiceNow.

Take the following action steps:

1. Research solutions that you think could solve for uncovered business challenges.

Build a thorough understanding of the [Now Platform's capabilities](#). Work closely with your ServiceNow account team and implementation partner for this.

2. Recommend solutions which solve for business challenges.

Create a prioritized list of solutions to implement. Prioritize solutions that resolve immediate business priorities, realize quick-wins to demonstrate early value, and create a strong foundation for future growth.

3. Identify implications on solution adoption.

Augment your recommendations with a program plan. Your initial program plan should include an estimate of resource requirements, [organizational change management \(OCM\)](#) needs, and [governance](#) needs.

Customer insights

ServiceNow recommends the following best practices to develop relevant, actionable recommendations.

INSIGHT 1:

Collaborate with key stakeholders to build your recommendations

If you create your business case recommendations in isolation from the rest of your organization, your business case may suffer from incorrect assumptions about what solutions are most relevant to your business objectives, and which will be easiest to implement. To avoid this, engage key stakeholders—especially those who are impacted by or expected to use ServiceNow on a daily basis—throughout the process of evaluating ServiceNow products and capabilities and developing implementation recommendations. This will ensure stakeholders provide you early feedback on which solutions will help you realize value, and it will give them a thorough understanding of ServiceNow capabilities so they can champion your case later.

Best practice – Partner with stakeholders to co-design your recommendations for ServiceNow products and capabilities to implement

Conduct live meetings with a group of representative stakeholders to evaluate ServiceNow products and capabilities and to identify those that can best address immediate business objectives. As you engage with stakeholders, start with these questions to ensure the ServiceNow products and capabilities you identify will meet your business needs:

- Will the selected product or capability solve for your (or your stakeholder's) problem across different use cases and/or teams?
- Do the recommended products or capabilities provide all the functionality we need?
- What would we prioritize first? Second? Third?
- What would we need (in terms of supporting capabilities) to realize the value other ServiceNow customers have realized?

The goal of these co-design sessions or live meetings with stakeholders is not to create a multi-year roadmap for ServiceNow implementation, but to create a prioritized list of ServiceNow products and capabilities that will address your most immediate business objectives and challenges.

Best practice – Estimate the level of support required for implementation success

Successful ServiceNow implementations are backed with the right level of support activities, such as OCM and training. Your estimate of the support required for implementation success should be derived from four kinds of support:

- **Training** – Training is a critical component of driving adoption and excitement on the ServiceNow solutions you implement. Consider the training needs for both your IT development team and ServiceNow users. Review our best practice guidance on [building an internal team of ServiceNow experts and training users](#) for additional details.
- **OCM** – Every successful implementation is supported with a robust OCM plan. For more on this, review our best practice guidance on [create an organizational change management plan](#). Your business case should indicate how your recommendations impact the OCM activities. As you take a holistic view of your recommendation's impact, consider the following changes:
 - Organizational design changes, including headcount changes and role (re)definitions
 - Performance management changes
 - Process and workflow changes
 - Engagement model changes
- **Governance and operating model changes** – Successful implementations have a clear governance and operating model that ensures coordinated and efficient decision-making. Review our best practice guidance on [building a dedicated, dynamic governance process, policies, and team](#) for additional details. Define the changes you would need to make in your existing governance and operating model to account for ongoing ServiceNow related decisions, including:
 - Demand qualification, funding, and approvals
 - Product planning and platform positioning
 - Architectural decisions to maintain scalability and flexibility
 - Planning, building, and running with dedicated resources you're already using

- **Technology and data integration** – Nearly all ServiceNow customers see additional value when they integrate with existing third-party applications. Your business case should identify relevant integration opportunities and account for the investment required for them. Review our best practice guidance on [planning your architecture, instances, integrations, and data flows](#) for additional help on defining your integration needs.

EXPERT TIP

Propose a [ServiceNow center of excellence](#) to govern and coordinate ServiceNow implementation across business silos and functional units.

Engage with stakeholders (such as your process owners or service desk managers) to learn about the implications of implementing each ServiceNow product and capability you recommend. *Don't aim to identify all required support activities, but instead determine the level of investment required for each category of support you need.* Typically, these estimates should be based on factors like the number of individuals impacted by your implementation, your organizational culture, your regulatory environment, and level of in-house skills and experience.

Use Table 1 or another similar framework to document the level of investment required on your support activities.

Support category	Investment (low, medium, high)	Estimated cost (in dollars)
Training		
Organizational change management		
Governance and operating model changes		
Technology and data integration		

Table 1: Framework for documenting the investment required for support activities

Best practice – Define expected business benefits and how to measure them

Work with stakeholders to reasonably size, scope, and time the relevant business benefits expected out of the capabilities recommended for implementation. Typical categories of business benefits ServiceNow customers gain include:

- Saving costs
- Increasing revenue
- Improving your Net Promoter Score (NPS)
- Reducing risk (including regulatory and compliance risk)
- Improving product quality and customer service
- Process and operational excellence

Start with these questions to evaluate your expected benefits:

- How would this impact <benefit category>? Is that a significant impact?
- Can we quantify the impact on <benefit category>?
- What processes related to the capability are likely to see this benefit?
- When do we expect to start realizing this benefit (as soon as we implement or over time, as more users start using the capability)?
- Is this benefit dependent on success with any other capability?
- What are the underlying risks to realizing this benefit?
- What additional areas or categories of benefits do you expect to realize?

Pick a maximum of three categories of top business benefits that you anticipate from the recommendations in your business case. Also, define how you're going to measure progress against each benefit instead of waiting for the implementation to complete (that is, the go-live) to do so.

ServiceNow recommends defining specific key performance indicators (KPIs) that the strategic governance team would track to demonstrate value realization. These KPIs are based on the anticipated sources and levers of the expected business benefits. For guidance on defining and selecting KPIs, refer to our best practice content on [Baseline and track performance, usage KPIs, and metrics](#).

EXPERT TIP

Set up [ServiceNow Benchmarks](#) (available for ITSM modules) to automatically track common benefit KPIs and to set targets based on industry average across ServiceNow users.

INSIGHT 2:

Make recommendations based on a logical sequencing of strategic objectives

Successful ServiceNow customers seldom take a big-bang approach to achieve their transformation vision. Instead, they clearly define their short-term versus long-term objectives, and create a roadmap to realize those objectives incrementally.

Best practice – Define a method to prioritize objectives and business problems to resolve

The criteria you define to prioritize should balance:

- Resolving your most immediate business objectives
- Building a robust foundation for future growth (for example, building capabilities like CMDB that future capabilities like Service Mapping depend on)
- Realizing quick wins—low-dependency, high-ROI investment opportunities

Figure 2 shows an example of an effective prioritization scheme.

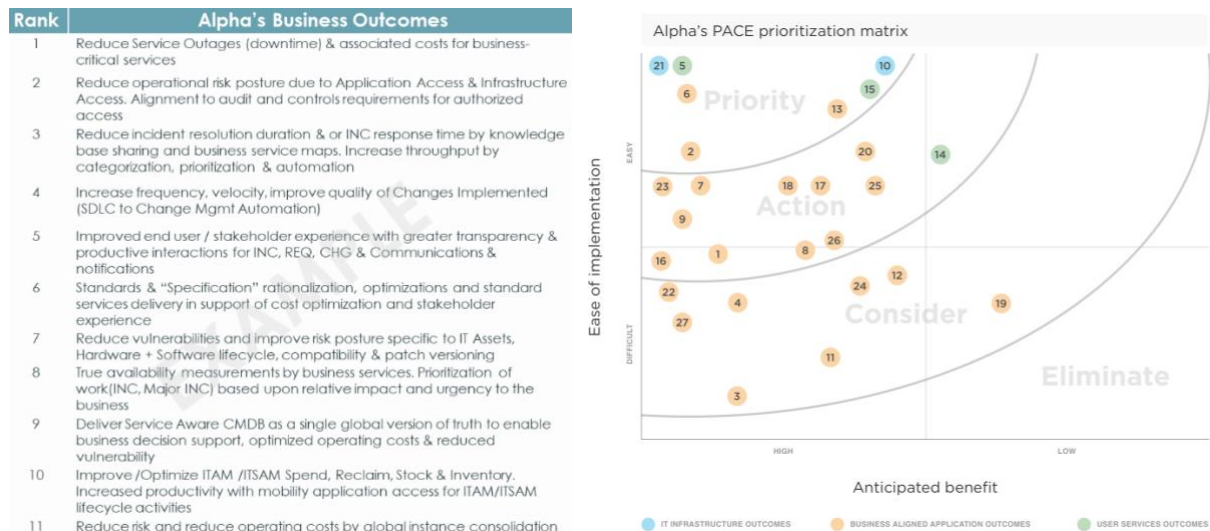


Figure 2: Example prioritization scheme from ServiceNow's customer Alpha (pseudonym)

Best practice – Highlight low-dependency, high-visibility capabilities and identify quick-win opportunities

Quick-win opportunities are the ServiceNow capabilities that will quickly demonstrate ROI early in your implementation. The ideal quick-win capabilities (see Figure 3) promote broad organizational exposure to ServiceNow through highly visible business process improvements, and they don't overpromise or have significant dependencies on other capabilities to show value.

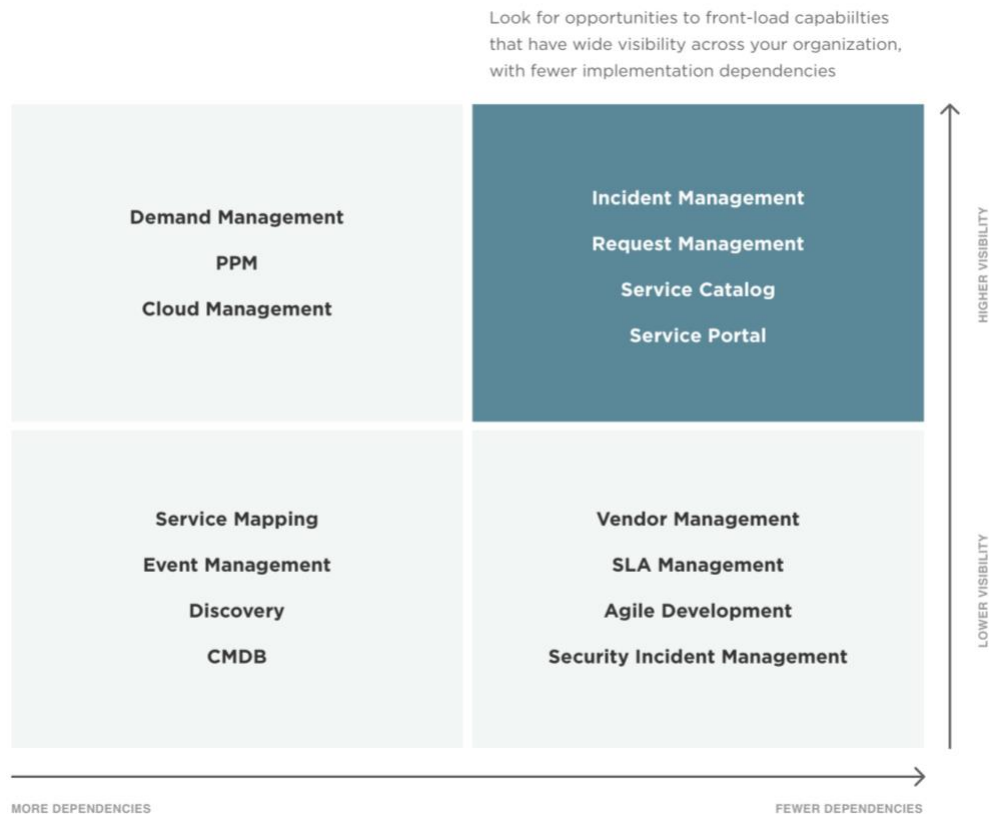


Figure 3: Framework to identify quick wins

The most common examples of quick wins include Incident Management and Request Management, given their visibility across your user base. By contrast, a capability like Service Mapping requires strong Discovery, Event Management, and configuration management capabilities for effective implementation and is less likely to be as quickly visible. Work with your ServiceNow account team and implementation partner (if you have one already selected) to learn about the dependencies, and work with stakeholders to identify your most visible quick-win candidates.

Best practice – Frame your recommendations in terms of phases

Frame your recommendations in terms of phases, starting with the most critical business problems you need to solve first. Although you don't need a detailed implementation roadmap for the ServiceNow business case, articulate how you'll prioritize your implementation of ServiceNow products and capabilities. The depth of the roadmap included in the business case depends on your organization's maturity with roadmapping practices.

ServiceNow recommends framing your implementation recommendations in terms of three phases at a minimum. Figure 4 shows an example.

In the first phase, look for opportunities to modernize existing business processes. This entails creating transparency across processes, simplifying them, and enforcing control to drive efficiency and optimize cost.

In the second phase, look for opportunities to transform existing business processes. This entails creating superior user experiences through advanced automation and effective service delivery channels.

Finally, in the third phase, look for opportunities to innovate the creation of new business service processes. This entails getting ahead of the curve through analytics and insights drawn from data across business silos.










	Problem		Solution	Capabilities
PHASE 1: MODERNIZE Create transparency, simplify and control	Process gaps	→	A single system of action	 Incident  Automation  Discovery
	Business silos and cross-functional inefficiency	→	Simplify and automate workflows	
PHASE 2: TRANSFORM Intelligent consumer-grade experiences	Ineffective delivery system	→	Multimodal delivery	 Catalog  Orchestrate  SLAs
	The expert bottle neck	→	Intelligent automation	
PHASE 3: INNOVATE Get ahead of the change curve	Data-to-decision delays	→	In-platform insight	 Incident  Automation  Discovery
	High service failure rate	→	Service portfolio management	

Figure 4: Example of a ServiceNow customer's three-phase transformation journey

Identify the critical business problems you can solve in each of these transformation phases, and highlight the ServiceNow products and capabilities to implement in each phase.

Note: The level of implementation detail you need to include in the business case depends on your organization's approval processes and stakeholder expectations. Always use business judgment and work closely with your stakeholders to identify the right level of detail you need to win investment in ServiceNow.

What to do next

With the basic “chapters” of your business case story in place—the problems and recommendations—you can make a call to action for investment by quantifying the return you expect in terms of expected benefits relative to cost.

Remember that the recommendations in this step are aimed to provide a baseline understanding on what needs to be done to realize your organization's vision for transformation with ServiceNow—not a full implementation roadmap. Once the business case is approved, you should revisit your work here and build a detailed, comprehensive ServiceNow implementation roadmap and program plan.

Step 3 – Construct the business case

KEY INSIGHTS

- Tailor your presentation to focus on the key message relevant for your audience.
- Aim for defensible estimates for cost and benefits using “best available data” validated by the operators closest to it.
- Communicate a cohesive, concise value-for-the-business story.

The next step in securing your investment for ServiceNow is to consolidate the information you've collected and show a clear return on investment based on the financial metrics that align to your organization's key strategic drivers (see Step 1).

To do this, take these action steps:

1. Estimate implementation time and cost.

Work with your implementation partner to estimate the time and costs, including labor, legal, licensing, and administrative costs.

2. Estimate benefits relative to cost.

Quantify the benefits you'll realize by implementing your recommended ServiceNow solutions. Start by accounting for the potential cost savings that come with improved workflow efficiencies and automation. Always use estimates backed up by reliable industry research. We recommend starting with [ServiceNow's Value Calculator](#), which is based on Forrester's Total Economic Impact™ studies.

3. Construct the business case.

Summarize your estimates to make the case for funding your ServiceNow investment.

Customer insights

ServiceNow recommends these best practices for constructing your business case.

INSIGHT 1:

Tailor your key message to each audience

Effective proposals answer “what's in it for me?” and “why should I care?” for the audience. Your business case socialization process should include the audiences that will be impacted by your ServiceNow implementation from business leaders to service and process owners to frontline fulfillment teams. A one-size-fits-all approach to socialization and communication can overlook each audience's specific priorities and risk the consensus you're trying to build.

Best practice – Emphasize the parts of the business case that matter most to your audience

Gain an understanding of the role each stakeholder audience plays in achieving the organization's strategic objectives, and highlight how ServiceNow can help resolve the key challenges each audience faces in playing that role effectively. Table 2 shows some examples.

Stakeholder audience	Key message to communicate
CIOs, CTOs, business-unit heads, functional leaders	How will ServiceNow help realize our organization's transformation vision? What business objectives will we be able to realize?
Service owners	How will ServiceNow improve the cost, speed, and experience of service delivery? How will we be able to develop innovative digital business services?
Process owners	How will ServiceNow allow us to redesign and simplify processes with the help of advanced workflow management and automation?
Service desk managers	How will ServiceNow help improve service agent and rep productivity and allow them to focus on higher-value activities?

Table 2: Examples of stakeholder audiences and their key messages

Ideally, you should have engaged with each of these stakeholder groups during Step 1 and Step 2. If so, defining the key message to focus on and ensuring solution alignment with each group will be easy.

INSIGHT 2:

Aim for the level of accuracy and detail required for your approval process

Your business case must convey costs and benefits. Aim for most impactful and defensible costs and benefits to meet your approval process rather than trying to account for a comprehensive laundry list of cost and benefit drivers.

Best practice – Use the ServiceNow Value Calculator to get a research-backed starting point for your estimate of benefits

Work with the stakeholders close to your recommendations (such as process and service owners, or service desk managers) to provide inputs to the Value Calculator. The estimates derived from the Value Calculator will give you a strong starting point to formulate the key component of the business case and your ROI calculation. Validate and refine these estimates based on your organizational context. Use these questions to refine your estimates with your stakeholders:

- How much more will we need to invest in support activities, such as OCM, based on the number of teams or individuals impacted in my organization?
- Are there any hidden cost drivers that are specific to my organization that we haven't accounted for?
- Will our key inputs (like the number of employees) significantly change in the near future (due to anticipated organizational changes, leadership change, or M&A activities)?
- Are there any lessons learned from past ServiceNow implementations that we should account for in these estimates?

Best practice – Define the advantage of implementing or extending ServiceNow relative to alternatives

It's likely that your proposal to implement ServiceNow will be evaluated against other technical solutions or tools. Highlight the advantages that ServiceNow provides relative to alternative solutions. Consider these differentiators:

- The opportunities to scale ServiceNow beyond the immediate need to enterprise service management use cases
- The ability to develop insights from integrated data across business silos and information systems
- The flexibility available in ServiceNow to develop intelligent apps to meet new business needs

INSIGHT 3:

Communicate the value-for-the-business story

Your business case should frame a clear and simple story of how ServiceNow can support your organization's vision for transformation. Answer these key questions:

- Why is the ServiceNow investment necessary to meet your business objectives for transformation?
- What business issues will the ServiceNow investment help resolve?
- How will ServiceNow help you realize your desired business objectives?
- What value will the ServiceNow investment provide?

Best practice – Make sure your business case tells a concise story

Use these questions as litmus test to evaluate whether your business case delivers a clear story to business and IT leaders, using concise, jargon-free language:

- Can you summarize the business case in one page? (See Figure 5 for an example of a one-page business case summary.)
- Do you have an elevator pitch that connects your business problem to your ServiceNow recommendation? In other words, can you tell the story in 30 seconds?
- Does the business case minimize technical jargon?

Business case — Executive summary framework

It's not just about the numbers!

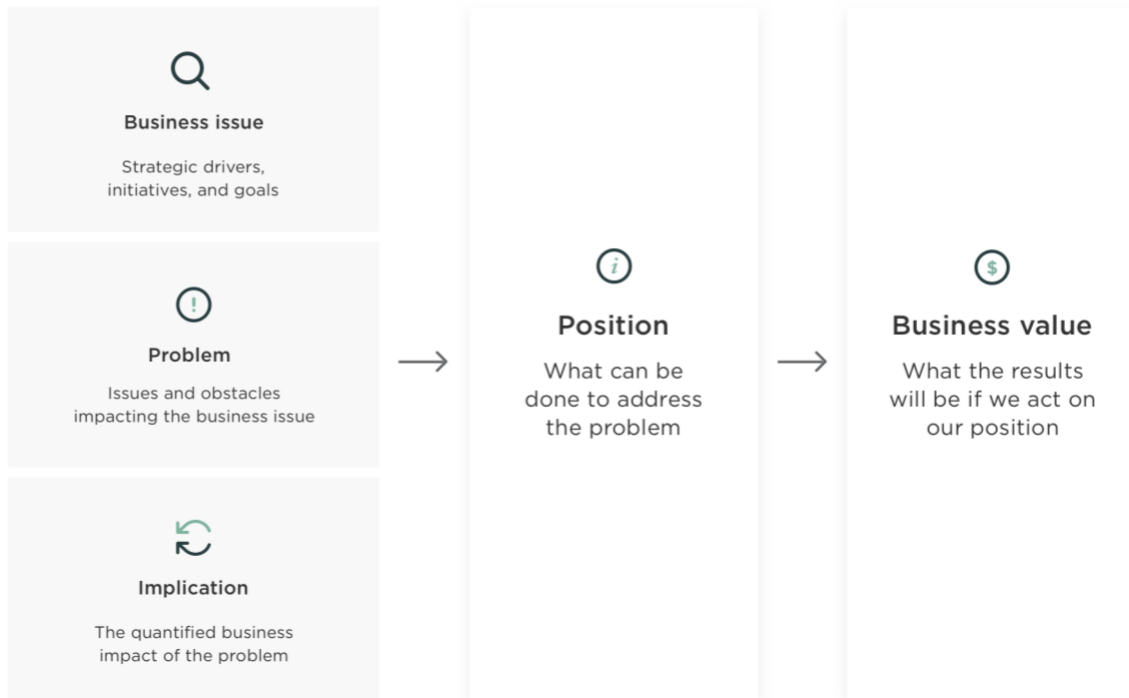


Figure 5: Example of one-page business case summary

EXPERT TIP

Create three levels of depth in preparing your pitch: five seconds, 30 seconds, and five minutes. The five-second version should be a concise, single sentence explanation of your recommendation. In the 30-second version, explain how your recommendation works by providing just enough interesting detail to help the audience understand what you're proposing. Once you're successful in scaling your recommendation down to five seconds and 30 seconds, you can expand it to five minutes. Brevity is the key to the initial success of a pitch.

What to do next

Once you have the business case ready, you may want to review it with your ServiceNow account team for additional guidance and feedback.

Your next step is to socialize the business case with the members of your investment committee and other key stakeholders who will be impacted by the ServiceNow implementation. This will help build buy-in to your proposal before and after it is approved.

Step 4 – Socialize, communicate, and finalize

KEY INSIGHTS

- “Count your votes” and solve for anticipated pushback before presenting your business case to the investment approval committee.

Ensure that you’ve built understanding and consensus among key stakeholders—including those who may not be directly involved in the approval decision but are affected by the ServiceNow implementation—before you formally present it to your investment committee.

To do this, take two action steps:

1. **Ensure you have consensus with key stakeholders on the “right problem to solve.”**

Share the business case draft with your executive sponsor and the key stakeholders you engaged during your background research. Incorporate their feedback and additional guidance into the business case draft.

2. **Submit and present your business case.**

Finalize the business case in the format that accords with your organization’s approval and funding processes.

Customer insights

ServiceNow customers recommend the following advice on socializing and presenting your business case.

INSIGHT:

Socialize your business case to surface potential objections

Successful presentations depend on how well you account for pushback or concerns raised by the investment committee members. In advance of the presentation, socialize the business case with key stakeholders to count your votes: Gauge the position of each committee member on the business case, and take note of any questions or pushback. This will give you an opportunity to make changes as needed and for your decision-makers to better prepare for the committee conversation. Based on your discussion, you and your committee members may both want to solicit feedback from your team or trusted advisors.

Best practice – Provide a preview to key decision-makers in each stakeholder group

The decision your investment committee members will make will likely be influenced by inputs and feedback they receive from the front-line managers and teams expected to use ServiceNow for their day-to-day activities. To ensure alignment and build support, socialize and preview the business case in advance with:

- Service owners
- Process owners
- Service desk managers
- ServiceNow champions (if any)
- Investment committee members and their direct reports

If you followed our guideline of engaging with stakeholders throughout the business case creation process, your preview won't be the first time you speak with them. The goal of these previews is to gauge the stakeholder(s) stance on the business case, build excitement around ServiceNow's business value, and surface and resolve any pushback.

Your preview should:

- (Re)-evaluate the key objectives and priorities of the stakeholder group
- (Re)-evaluate the key business issues or problems they face in meeting their objectives
- Walk through the business case as it will be presented to your investment committee
- Assess your stakeholder(s) buy-in and potential points of pushback

Ensure you refine and adjust your business case based on the feedback you received and during your previews.

EXPERT TIP

Conduct previews with frontline stakeholders, those who are expected to use ServiceNow, before meeting with investment committee members. This will equip you with direct feedback that you can share during previews with individual investment committee members.

What to do Next

Stop selling the business case once you get a "yes." Shift your focus to talk about putting the implementation roadmap and program plan to action.

Bear in mind that the project isn't complete, or success isn't achieved, at go-live. As your next step, look for opportunities to show early value to demonstrate the credibility of the business case you presented.

Step 5 – Monitor and manage your value realization

KEY INSIGHTS

- Track and report metrics that help you demonstrate value early and enhance credibility.
- Capture lessons learned to improve your business case creation process.

Monitor the value you've realized against the objectives laid out in your business case to help you surface new opportunities to see more value and continue to build the organization's confidence with ServiceNow.

To do this, complete these action steps:

1. Monitor the value you've realized.

Review the value you've realized against the objectives in your business case regularly. Make it central to the agenda of your strategic governance committee for ServiceNow.

2. Create value awareness.

There are two parts to making others aware of ServiceNow value. First, ensure your process and application owners are clear on the value they can expect from ServiceNow, as defined by your business case, and how to measure it. Second, as you continue to enhance ServiceNow, promote and share success stories across your organization.

3. Identify new value creation opportunities.

Continuously look for areas of improvement that's based on feedback from your implementation team and ServiceNow users. We recommend reviewing the ServiceNow roadmap regularly as part of your strategic governance activities to evaluate new opportunities for value creation and include them in the roadmap, as appropriate.

Refer to [Success Playbook: Realize and value from your ServiceNow investments](#) for detailed guidance on value management.

Customer insights

ServiceNow recommends the following insights.

INSIGHT 1:

Create a plan to track and manage value realization

Value realization is a team effort, and isn't just the platform owner's responsibility. To maintain your focus on value realization, you need a plan that clearly indicates:

- Who is responsible for tracking the value realization KPIs
- How frequently (and by whom) they're reviewed
- Who is responsible for making the required course correction decisions

Best practice – Make value realization central to strategic governance

The most important goal for your strategic governance team is to make sure you're seeing both short and long-term value. Every key decision the strategic governance team makes must be to either course correct or create additional opportunities to find value.

As part of every strategic governance meeting:

- Explicitly confirm your assumptions and benefits are still accurate and relevant.
- Measure your benefits attainment against your targets (financial and operational). If your team hasn't explicitly defined the financial benefits, establish baseline measures and interim goals that are aligned to your ServiceNow roadmap.
- When you're not seeing the benefits you expect, identify the root causes so you can make improvements or take corrective action.
- Set milestones every six months that define what you expect to deliver to the business by that time.
- Make sure that implementation budget and timing trade off decisions are made with an understanding of the impact they'll have on achieving value.

For details on the activities of the strategic governance team and how they work with other ServiceNow teams, refer to our best practice guidance on [building a dedicated, dynamic governance process, policies, and team](#).

INSIGHT 2:

Don't wait for major milestones to demonstrate value

Look for opportunities to demonstrate the value you've found early, especially with the quick wins you identified in Step 2. This will help you continue to build support for implementation and strengthen the credibility of any additional business cases you bring to your investment committee.

Best practice – Track and report metrics that provide early indicators of value realization

Take a phased approach to reporting value realization. Start with simple, easy-to-track indicators of progress toward your business objectives. Here's an example that's based on the transformation journey shown in Figure 4.

- **Phase 1: Modernize** – Measure the early indicators of cost savings and increased efficiency. Examples include:
 - The number of processes you've automated (for example, password reset) that are reducing your operating costs
 - Increased service delivery efficiency
- **Phase 2: Transform** – Focus on the indicators of improved service experience and employee productivity. Examples include:
 - Faster delivery on employees' and customers' requests
 - Improved adoption of self-service
 - Improved employee satisfaction ratings
 - Improved SLA adherence

- **Phase 3: Innovate** – Look for indicators of the new business value you've unlocked through ServiceNow. Examples include:
 - New revenue channels
 - Improved speed to market (potentially measured through the time taken to deploy new business applications)

EXPERT TIPS

You don't always have to show numbers to demonstrate value. An effective way to highlight value is through success stories. Ensure you work with key users to identify success stories that can inspire the whole organization and build confidence in ServiceNow.

Always market and celebrate value realized success. This would demonstrate your ability to be a great financial steward of the company's resources, making it easier to get funding for future projects.

INSIGHT 2:

Sharpen your business case creation process

It's likely that your first ServiceNow business case focused on implementing one or a few ServiceNow products. As you continue to realize value from ServiceNow, you may want to implement additional ServiceNow products. And you may need a business case for every new product. As with other program activities, build a consistent, efficient process for business case creation so you can rapidly expand your ServiceNow portfolio.

Best practice – Capture lessons learned from your investment approval committee

To better prepare yourself for your next business case presentation, capture the lessons you learned after every business case you deliver. Conduct post-mortem interviews with your stakeholders and investment approval committee members to discover the answers to these questions on presentation, implementation, and process:

- **Presentation:**
 - What pushback did we get from stakeholders and decision-makers?
 - What information, if we'd included in the business case, would have minimized pushback or concerns?
 - What feedback did we receive on the presentation? Could the value-for-the-business story be clearer?
 - Was the presentation timed well in terms of its length and the discussion management? What could be improved?
- **Implementation:**
 - Which of our recommendations and estimates proved to be most correct? Which ones would we refine in future?
- **Process:**
 - Which stakeholders were instrumental in creating and getting approval on our business case?

- Which stakeholders should we have socialized the business case with (but didn't)? How did it affect the creation and approval of our business case?
- What additional sources of information should we have explored to close our information gaps?

Ensure you review the lessons you learned from past business cases before you start creating additional business cases.

EXPERT TIP

Although you may create a business case every time you invest in ServiceNow, ensure you don't create contradicting value stories. There should be a clear, consistent link between all the business cases you create for ServiceNow that reflects your organization's vision for transformation.

What to do next

Business case creation is one of the first steps you take to deliver your organization's vision for transformation with ServiceNow. The return on your investment depends on your ability to build a comprehensive ServiceNow implementation roadmap and program plan from your business case, such that you can provide both quick wins and a robust foundation for future growth.

Before you start implementation, create a baseline set of metrics and KPIs you'll use to monitor usage, performance, and value.

The takeaway

The process of creating and communicating a strong ServiceNow business case won't just help secure stakeholder buy-in—it also ensure the capabilities you implement support your organization's strategic business objectives. Additionally, a good business case ensures you'll have clear targets to direct your implementation roadmap for ServiceNow.

What does “good, better, and best” look like for this activity?

Good – You have a business case that focuses on the problems to be solved with implementation of ServiceNow.

Better – Your business case also addresses how the problem will be resolved with clear measures for return on investment and the means to track those measures.

Best – Your business case tells a cohesive story that's presented in executive language and defines:

- Why ServiceNow investment is necessary to meet your business objectives for transformation
- What business issues investing in ServiceNow will help resolve
- How ServiceNow will help you realize desired business objectives
- What value, measured in terms of tangible financial evidence, the ServiceNow investment will provide.

What I should convey to my team?

The process of creating a business case is critical for the ServiceNow platform team to secure stakeholder buy-in and ensure the capabilities proposed for investment reflect our organization's key business objectives.

For access to actionable insights on this topic, review our [Success Checklist](#).

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at best.practices@servicenow.com.

Appendix

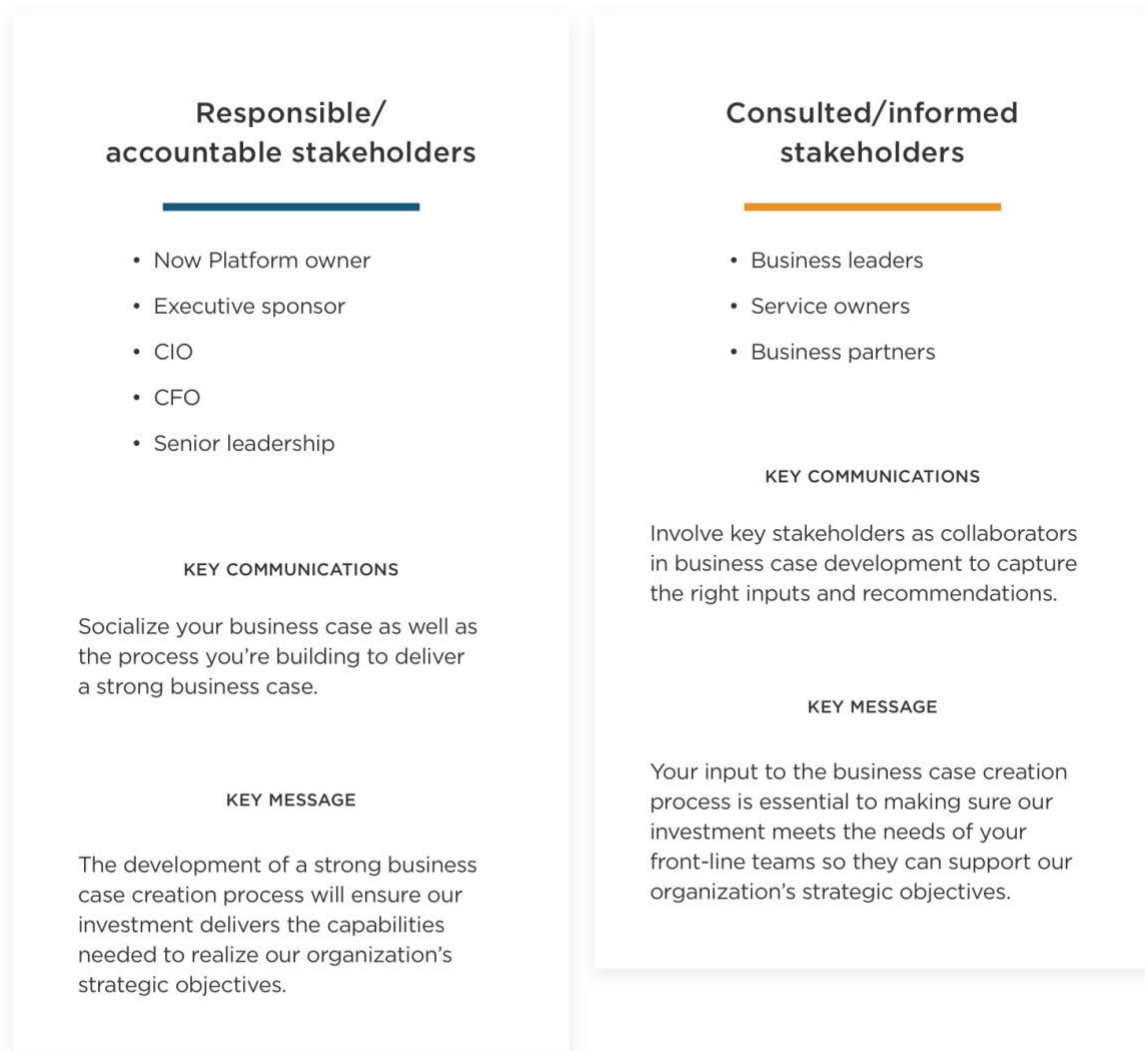
Key performance indicators (KPIs)

Measure the following KPIs to assess the effectiveness of your ServiceNow business case creation process:

- *Number of business leaders who have reviewed and provided input (relative to target)* – This metric indicates the comprehensiveness of your development and socialization process.
- *Percentage of business case investments approved* – This metric indicates the level of confidence you were able to build in your recommendations.

Stakeholder management

Use the following chart to identify which stakeholders need to be held responsible and/or accountable and which should be consulted and/or informed.



Related resources

- [Success Checklist – Build your business case](#)
- [Success Checklist – Build a phased program plan, identify quick wins](#)
- [Success Playbook – How to start the implementation journey with ServiceNow](#)
- [Success Playbook – Realize and manage value from your ServiceNow investment](#)
- [ServiceNow Value Calculator](#)