

# Stand up a ServiceNow Center of Excellence and Innovation

## What's in this Success Playbook

This Success Playbook will guide you in developing a blueprint for a ServiceNow Center of Excellence and Innovation (CoEI), including:

- How to define a charter, organizational structure, and operating model that will drive your vision for ServiceNow to digitize workflows
- How to position the CoEI to engage effectively with key stakeholders who will help you realize value from ServiceNow: your business partners, service owners, and process owners
- How to resource and run your CoEI so it can improve scale, velocity, and risk management for ServiceNow

## Why do you need a ServiceNow CoEI?

A ServiceNow CoEI concentrates expertise in strategy, architecture, support, design, and development to create a scalable delivery model for digital workflows. By eliminating the “seams” between these functions, it improves the velocity from idea to value delivery. With a CoEI, your efforts across teams are consistently aligned with your strategic goals for digitizing workflows and enterprise service management, and you avoid the risk of projects becoming disconnected from clear business return.

## Key takeaways

### The most important things to know

A CoEI consolidates teams for strategy, business engagement and delivery, platform architecture and support, and innovation to reach value faster and advance ServiceNow's role as an enterprise platform for digitizing workflows. A CoEI removes the organizational seams that can inhibit your ability to move from vision to value with ServiceNow.

Some aspects of your CoEI may look similar to CoEs in place for other platforms, but your CoEI should have unique competencies and resources for developing innovations in productivity and

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enhanced employee and customer experiences. Don't just "relabel" platform support, project management, or application development for ServiceNow as a CoEI—instead, your CoEI's value is in leading and coordinating these activities in pursuit of your strategic vision.

## The payoff of getting this right

Successful CoEIs are able to realize—and accelerate—value realization from ServiceNow across the enterprise as they:

1. Set and oversee policies and processes that guard against technical risks, like ungoverned customization
2. Improve the scale and velocity of development teams
3. Help business functions find and scale opportunities to improve efficiency in service delivery
4. Help business lines discover new opportunities for innovation, both in terms of productivity and experience

## What you need to get started

To stand up an effective CoEI, you need a clear vision and roadmap for ServiceNow, supported by engaged executive sponsors and strategic governance over your roadmap. We discuss these prerequisites in Step 1 of this Success Playbook. For more best practice guidance in these areas, see the following Success Checklists and Playbooks:

- Success Checklists:
  - State your transformation vision and outcomes
  - Build a dedicated, dynamic governance process, policies, and team
- Success Playbooks:
  - Where to start the implementation journey with ServiceNow
  - Build a dedicated, dynamic governance process, policies, and team

## When you should start this activity

You should stand up your CoEI as a vehicle to promote best practices and standards before demands for ServiceNow capabilities begin to scale (or, ideally, before you even take on enterprise demands), especially since risks (for example, the risk of ungoverned customization) can increase as you scale your organization's use of ServiceNow.

Have your roadmap, executive sponsor, and strategic governance principles in place first, and establish your CoEI framework as soon as possible afterward. If you're implementing ServiceNow, start planning for a CoEI to meet your demands for scale, velocity, and innovation no later than the point when you've completed 80% of your initial implementation phase (ideally, sooner).

If you've already implemented ServiceNow, you'll need to decide how you can reorganize your ServiceNow resources into a CoEI. In most cases, divide your current team between a platform architecture and support function and a business engagement and delivery function, and add resources for strategy and innovation. See Steps 2–5 for more information.

## Playbook overview

ServiceNow recommends five steps to stand up a CoEI that will help you scale the value you capture from ServiceNow.

| Step   | Outcome  |   |
|--|--|---|
| <b>Start</b><br>At the beginning, you'll build your initial or foundational capability. This includes setting up initial frameworks, defining roles, and clarifying your objectives. | <b>Step 1</b> – Set the foundations for your CoEI  | You have the necessary prerequisites in place to support and make the case for your CoEI.   |
|  | <b>Step 2</b> – Define a charter and structure for your CoEI                                       | You have clearly defined CoEI functions and measures of success.  |
| <b>Improve</b><br>As you improve, you'll take steps that help you reach your objectives and see value fast.  | <b>Step 3</b> – Define an engagement and delivery model with business, service, and process owners | You have a clear model for how CoEI functions engage with business, service, and process owners to meet business demands and deliver value. |
|  | <b>Step 4</b> – Define your resourcing model   | You have the right headcount and funding support to ensure your CoEI's success.   |
| <b>Optimize</b><br>Last, you'll refine and expand your capabilities so you can scale as you grow and continuously get more from using ServiceNow.                                    | <b>Step 5</b> – Operationalize your CoEI and advance your vision for digital transformation        | You have a defined cadence of CoEI activities and metrics that help you assess your CoEI's effectiveness in driving enterprise value.       |

Start with Step 1 if you have not begun your ServiceNow implementation, are early in your implementation, or are unsure if you have the right prerequisites in place to make your CoEI effective.

Start with Step 2 if you have your prerequisites in place but don't yet have a roadmap for your CoEI.

Start with Steps 3 and 4 when you have a charter and roadmap but have yet to resource it or define its role and activities relative to other stakeholders.

Finish with Step 5 for guidance on how to run your CoEI and use it to advance ServiceNow as a platform for enterprise digital transformation. Set regular review periods to assess your structure, engagement and delivery model, and resourcing model to ensure your CoEI remains relevant as your organization changes.

## How does ServiceNow define a CoEI?

A CoEI is a recommended organizational construct for optimizing the strategic value delivered by your ServiceNow implementation. It's more than a platform operations/support team because it consolidates teams for strategy, business engagement and delivery, platform architecture and support, and innovation, removing the organizational seams that can inhibit your ability to move from vision to value. A CoEI is also more than an application development function—as your CoEI matures, it should coordinate and govern development, but development should ideally take place outside of the CoEI.

While your ServiceNow CoEI may appear similar to CoEs you've set up for CRM or ERP, the key difference for your CoEI is its focus on driving digital transformation with ServiceNow. Your CoEI will need unique competencies and resources for developing innovations in productivity and enhanced employee and customer experiences through digital workflows across the enterprise. This is why we recommend the inclusion of a dedicated innovation team in your CoEI, as outlined in Step 2 of this playbook.

## Terms and definitions

**Demand management** – Demand management is a set of governance activities that focuses on measuring, predicting, and understanding customers' usage patterns, anticipating their changing needs, and assessing their demand for products and services. Demand management ensures that the ServiceNow platform team and service delivery function have the capacity to meet business partner demand and are responsive to business partner requirements so that services provided are fit for purpose.

**Governance** – Governance is the set of policies, processes, and organizational capabilities that define how decisions are made for ServiceNow and who is responsible for outcomes.

**Process** – This is a repeatable, structured series of steps designed to accomplish a particular outcome. For example, a process might be the steps that go from collecting data on a reported incident to triggering a change in the system to resolving the incident.

**Process owner** – This person is solely responsible for owning a process. The process owner is accountable for designing an effective and efficient process, using the right people and

financial and technical resources to run the process, and delivering quality outcomes as required within the organization.

**Process manager** – This person is responsible for the end-to-end execution of a process and has operational control, facilitates the daily activities, and provides insight into where improvement is needed to enhance performance.

**Service** – A service is a means of delivering value to customers by facilitating outcomes that customers want to achieve.

**Service offering** – A service offering consists of one or more service commitments that uniquely define the level of service in terms of availability, scope, pricing, and packaging options. Customers can choose to receive different levels of performance and features for a given service through service offerings (typically made available as distinct items in the service catalog). A service can have multiple service offerings (each made available as separate catalog items) with different service level agreements.

**Service owner** – This person is solely responsible for owning a service, including managing service cost, performance, and outcomes. The service owner is accountable for designing an effective and efficient service, using the right people and financial and technical resources to run the service, and delivering quality outcomes as required within the organization.

**Service manager** – This person is responsible for the end-to-end operations of a service. The service manager has operational control, facilitates the daily activities, and provides insight into where improvement is needed to enhance performance.

## Step 1 – Set the foundations for your CoEI

### KEY INSIGHTS

- Look forward—define an enterprise vision for ServiceNow and digital transformation to build a stronger case for your CoEI.
- Frame your opportunities for your CoEI to support digital innovation, not just digital service delivery.

You should have a clear vision and roadmap for ServiceNow before you build and resource a CoEI. Without this vision in place, it's more likely that your CoEI will act more as a program and project management office—if you can get resources at all—rather than as a focal point for best practices, demand management, and innovation. Your vision should begin to stretch stakeholders' perceptions of how ServiceNow can grow, post implementation, to ensure your CoEI can attract the right engagement and resourcing.

Complete these action steps to ensure you have the right prerequisites in place for your CoEI.

### 1. Build and evangelize a clear vision for ServiceNow that connects to measurable business outcomes.

To avoid the internal perception that ServiceNow is an IT ticketing tool rather than a platform for IT or enterprise productivity, construct a single page that connects an executive-level vision for digital transformation to concrete measures of success that you can achieve with ServiceNow. See Figure 1 for an example.

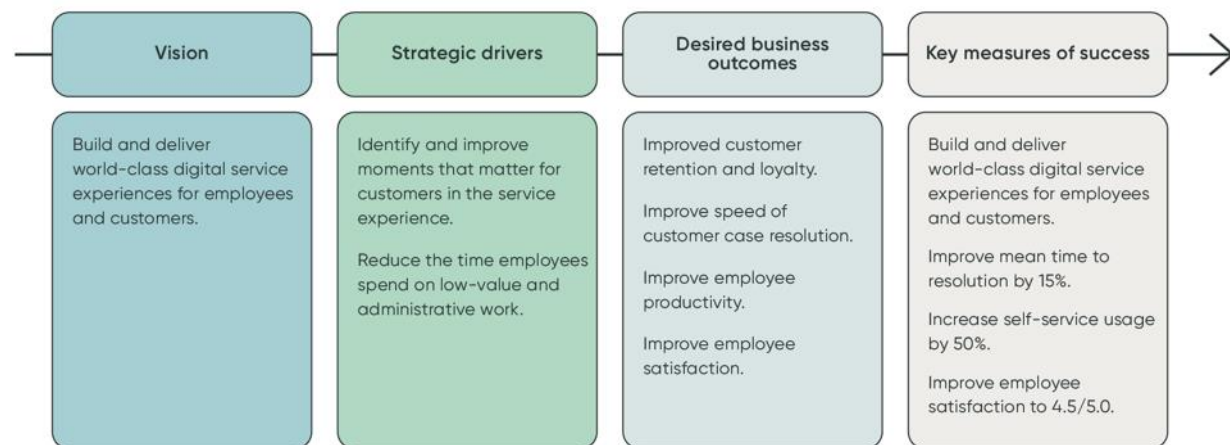


Figure 1: An example of a “vision on a page” for ServiceNow

Your vision doesn't necessarily need to be detailed. In fact, you should begin to stand up your CoEI even if your vision isn't fully fleshed out to make sure you can meet demand as you scale. Like most customers, your vision will continue to evolve.

## 2. Explicitly connect standing up your CoEI to your vision for digital transformation and ServiceNow.

Once you have your initial vision statement, you should be able to show, on a single page, how the CoEI will advance your vision and outcomes. Figure 2 shows an example of this, which should help you frame your business case for a CoEI. You can use this to arm your executive sponsor(s) as they advance adoption of ServiceNow across the enterprise and stimulate new demand.



Figure 2: One-page mini business case for a ServiceNow CoEI

## 3. Get the right executive sponsor(s) in place to articulate and support your vision for ServiceNow and a CoEI.

Before you begin planning your CoEI, evaluate whether you have the right level of executive sponsorship to advance your strategic vision for ServiceNow across enterprise leadership teams. Answering these questions can help your evaluation:

- **Is our potential executive sponsor inwardly or outwardly focused?** Executive sponsors perceived as inward, or focused primarily on the operations of their internal organizations (IT infrastructure operations, for example), may not be able to spend the time needed to advance a vision to enterprise partners. Executive sponsors with a demonstrated

“outward” focus—for example, CIOs who spend the majority of their time with business partners already—may be better positioned to support your CoEI.

- **Does our potential executive sponsor have sufficient influence?** Executive sponsors without demonstrated influence may be able to articulate a strategic vision but may be less likely to advance this vision across the enterprise.
- **Does our potential executive sponsor have a demonstrated track record of innovation?** Executive sponsors without innovation experience may be more likely to position ServiceNow (and, by consequence, the CoEI) as a delivery mechanism rather than as a potential engine for innovation in digitizing workflows.
- **Does our potential executive sponsor have the ability to secure resources to support a CoEI?** Your CoEI will need dedicated line-item funding that's separate from project-based funding. Your executive sponsor should have the influence or authority to allocate appropriate budget resources to support your CoEI.

#### What if my executive sponsor is reluctant to support a CoEI?

In some cases, your executive sponsor may not see the need for a CoEI. It's essential to change this perception before you begin to build a charter and roadmap for your CoEI. Start by connecting your vision for a CoEI to your executive sponsor's top business objectives. See Figure 2, on page 9, for an example of how to frame this discussion through a “mini business case.”

#### 4. Ensure you have a clear strategic roadmap and governance in place for your ServiceNow implementation.

A CoEI should not be seen as a substitute for a roadmap and effective strategic governance for ServiceNow. If you don't have these in place, focus first on establishing them (or, at a minimum, establish these functions in parallel, and use the CoEI to help with their establishment). For more detailed guidance on governance, see our [Success Checklist](#) and [Success Playbook](#) on building a dedicated, dynamic governance process, policies, and team.



## Customer insights

Our customers' experience points to one insight you should keep in mind as you define your strategy.

### INSIGHT:

#### Frame your opportunities for digital innovation—not just digital service delivery

Many organizations may have a standard CoE template when considering the same for ServiceNow. This isn't necessarily a bad thing—there's no need to reinvent the wheel if relevant artifacts can be copied over from CoEs stood up to support other strategic platforms, like ERP or CRM.

But copy these CoEs with caution. You can risk defaulting to a CoE that's focused on scaling service delivery without recognizing the differences between ServiceNow and other strategic platforms. Most critically, the case for a ServiceNow CoEI should include opportunities for innovation in light of the enterprisewide opportunity for digitizing workflows.

#### Best practice – Explicitly define the role of the CoEI as an innovation hub for digital transformation

Name your center a Center of Excellence **and** Innovation to set the expectation that your CoEI will serve as the go-to resource for business lines looking to discover innovation opportunities. For many business lines, the ability to digitize workflows is a new strategic opportunity, and your business partners will need guidance to support idea generation.

To advance the role of ServiceNow as a platform for innovation, explicitly position:

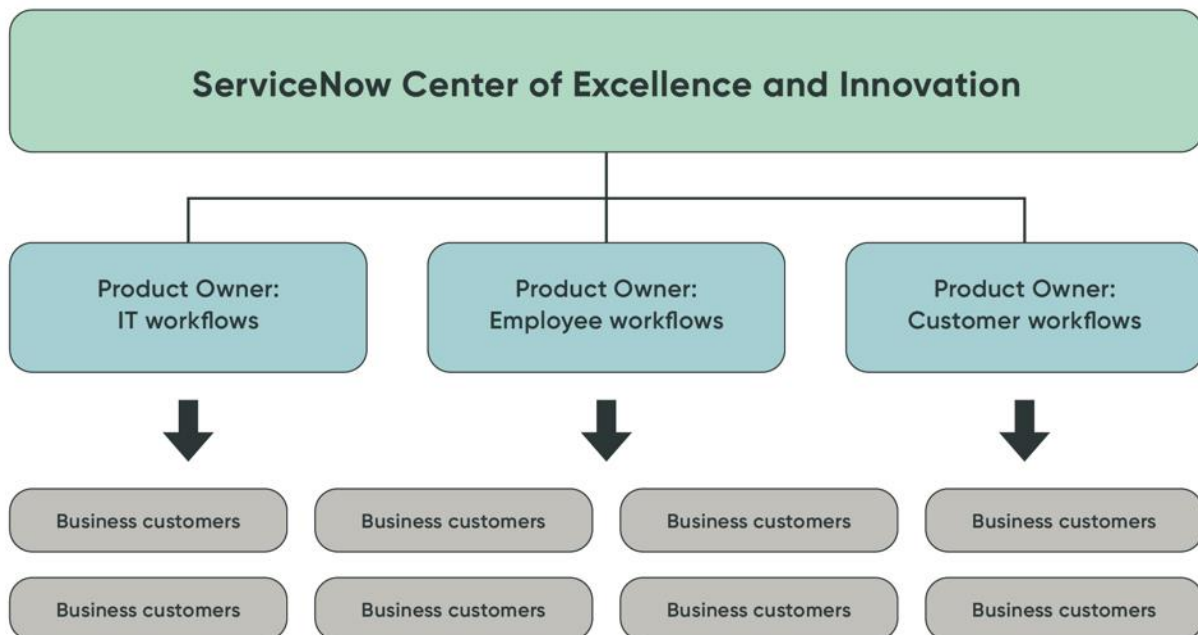
- Framing that shows what ServiceNow can do to deliver innovation in support of business outcomes. Frame innovation potential in terms of:
  - Unlocking productivity by digitizing IT and business workflows
  - Delivering next-generation employee experiences with digital workflows and self-service
  - Simplifying customer workflows with predictive intelligence and self-service
- Resources that can help educate and promote new ideas with business stakeholders (see Steps 2 and 3 for more detail)
- The name, charter, and structure of your center so they all reflect your capacity for innovation. Think about how you will effectively “brand” your CoEI.

## Should you have a ServiceNow CoEI or should this be part of a functional CoE?

Some customers may decide to stand up a CoE aligned with a function (for example, an IT Service Management CoE, HR Service Delivery CoE, or Shared Services CoE), especially as they look to standardize their organizations on a consistent set of service management processes and workflows. If that's the case, your structure (see Step 2) will need to include more resourcing for process definition and governance in addition to what's in place for overseeing ServiceNow. But this should not present any conflicts to the recommendations in this playbook. The Appendix includes a sample organizational chart for a CoEI aligned to support enterprise service management.

If you do embed ServiceNow within a function-specific CoE, like one for ITSM, still consider establishing a distinct ServiceNow CoEI as you expand ServiceNow use outside of IT in the future. Your goal should be to develop a consolidated strategy, governance, and architecture framework for ServiceNow across enterprise functions.

In an enterprisewide model, your ServiceNow CoEI should have designated product owners in your business engagement and delivery team (see Step 2) who are aligned with the three types of digital workflow experiences ServiceNow offers to customers: IT, employee, and customer workflows. (Note: This should also provide a natural set of categories for the services you offer to customers in an enterprise service management model.)



## What to do next

After you set your foundations—and begin to define the *why* for your CoEI—your next step is to define and promote the charter and structure for your ServiceNow CoEI. Remember that your vision, whether for ServiceNow or your CoEI, is not a one-time “sell.” The CoEI and other functions

involved in strategic governance should constantly reinforce this vision by tracking and communicating the business value and innovation the CoEI is able to bring to the enterprise.

## Step 2 – Define a charter and structure for your CoEI

### KEY INSIGHTS

- Align the CoEI's charter and function to your organization's maturity with ServiceNow.
- Focus your staffing on the hard problems that the CoEI needs to solve to improve velocity and scale.

The CoEI needs to be more than your ServiceNow platform operations or support team or a program office to drive implementation. It should incorporate these functions, but too often, organizations can overweigh platform administration and support in their CoEI structure—leading to a CoEI that acts more as an administrative function than as a true source of excellence and innovation in delivering business outcomes.

The charter you establish needs to focus the CoEI on transforming business demands into business outcomes and on solving the hard problems that present obstacles to value realization. Hard problems will evolve as your implementation matures: In your initial implementation phases, the focus for your CoEI should be to ensure guardrails are in place to protect against risks to platform operations and support, like ungoverned customization. As you mature, your CoEI's focus will shift to promote scale and velocity in service delivery and drive innovation across enterprise (not just IT) services.

Complete these action steps to define your CoEI's charter and structure.

### 1. Define clear deliverables and measures of success for the CoEI, reflecting its role in governance, innovation, and delivery.

The charter for your CoEI should begin with a clear, executive-level statement of what the CoEI should deliver. This should reflect the vision you developed in Step 1 for ServiceNow and digital workflows across the enterprise. You should define—ideally on a single page—how your CoEI will drive that vision through governance, innovation, and delivery, and how your partners will be able to assess the CoEI's success. Your charter should communicate the value proposition of the CoEI to the rest of the enterprise so that the CoEI isn't seen as an "IT-only" function or as a reorganization of your platform team. See below for an example.

### Example introduction statement for a CoEI

Our ServiceNow Center of Excellence and Innovation will provide:

- **Best practice standards for digital workflow design** – As we use automation to create new efficiencies and employee experiences, the CoEI will define consistent, world-class, reusable standards for design and development.
- **Innovation prototyping for digital workflows** – The CoEI will provide expert assistance for assessing and developing new business opportunities for workflow automation and for scaling those that deliver value.
- **Governance and resource management** – By managing governance and resources, we ensure that work on ServiceNow reflects our highest business priorities and guards against risk.
- **Value management** – By managing the value, we ensure that our investments in ServiceNow deliver clear financial return, and that our management of workflows is systematically guided by business value.

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The CoEI's success will be determined by the value we are able to provide back to the business through employee productivity (in terms of hours saved in a workflow), improvements in internal customer satisfaction, and the number of new value-creation opportunities captured using ServiceNow.

## 2. Define the structure for the CoEI's functions, and their specific measures of success.

Your CoEI should include functions for:

**Strategy** – Your CoEI should have a function that governs how you'll define, oversee, and maintain the ServiceNow roadmap in a way that supports effective strategic and portfolio governance. This function should also provide strategic oversight of organizational change management (OCM), responsibility for funding, and an active focus on defining strategic opportunities for innovation.

- **Deliverables for this function** include the:
  - ServiceNow roadmap
  - Definition of governance responsibilities across stakeholders
  - Budget
  - OCM plan
  - Alignment of projects
- **Measures of success** should reflect your value realization from ServiceNow as well as your ability to effectively manage risk.

**Business engagement and delivery** – This CoEI function should be the vehicle for making sure that delivering new capabilities remains aligned with your business objectives and roadmap priorities.

- **Deliverables for this function** include the delivery of new capabilities and applications in response to business demand.
- **Measures of success** should reflect:
  - On-time/on-budget solution delivery at expected quality thresholds
  - Effective reuse of processes, services, and applications to meet new business demands
  - Business acceptance and adoption of new releases

**Platform Architecture and Support** – Your CoEI should incorporate your platform operations or support function, as well as architecture resources to define your instance strategy, data quality standards, platform policies and standards, and development best practices.

- **Deliverables for this function** include defined technical governance policies and standards as well as the defined processes for platform operations or support and administration, such as security access control, migration of system changes, or upgrade management
- **Measures of success** should reflect what you can measure in a ServiceNow HealthScan:
  - Upgradeability
  - Platform performance
  - Security
  - Ease of system administration or management
  - User experience

**Innovation** – Your CoEI should contain resources (or support) for workflow and experience design, innovation opportunity spotting, and data integration with other strategic platforms.

- **Deliverables for this function** include the defined processes for bringing innovation opportunities from concept to completion and standards for human-centered design and user experience.
- **Measures of success** should reflect adoption growth of ServiceNow as well as the number of innovation opportunities identified.

See Figure 3 for a detailed depiction of this structure.

| COEI functions             | Strategy   | Business engagement and delivery  | Platform architecture and support   | Innovation  |
|----------------------------|--|---|---|---|
| <b>Leadership</b>          | Platform owner   | Development lead<br>Product owners for ServiceNow capabilities (e.g., ITSM)   | Platform architect<br>Lead system administrator   | Experience architect  |
| <b>Activities</b>          | <ul style="list-style-type: none"> <li>Roadmap oversight and management</li> <li>Value management</li> <li>Talent strategy</li> <li>Budget and resourcing</li> <li>Governance oversight</li> </ul> | <ul style="list-style-type: none"> <li>Workflow design</li> <li>Demand intake and innovation opportunity spotting</li> <li>Training, organizational change management and stakeholder communications</li> <li>Standards and best practices for application development and testing</li> </ul> | <ul style="list-style-type: none"> <li>ServiceNow instance and architecture strategy</li> <li>Data management</li> <li>Deployment/implementation methodology and oversight</li> <li>Integration</li> <li>Standards and best practice definitions for: <ul style="list-style-type: none"> <li>Configuration and customization</li> <li>Integration</li> <li>Security</li> <li>User experience</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Innovation opportunity spotting</li> <li>Experience design and standards</li> <li>Deployment/implementation methodology and oversight</li> </ul> |
| <b>Measures of success</b> | <ul style="list-style-type: none"> <li>Value realization</li> <li>Effective risk management</li> </ul>   | <ul style="list-style-type: none"> <li>On-time/on-budget delivery</li> <li>Developer utilization</li> <li>Deployment success rates (including upgrades)</li> </ul>  | <ul style="list-style-type: none"> <li>Platform performance</li> <li>Adherence to standards and best practices</li> <li>Security</li> <li>Upgradeability</li> <li>Ease of system administration/management</li> <li>User experience</li> </ul>  | <ul style="list-style-type: none"> <li>Adoption and usage</li> <li>Innovation opportunities identified</li> <li>Workflow/process improvement opportunities captured</li> </ul>          |

Figure 3: CoEI functions, leadership roles, activities, and measures of success

Your specific team structure can be configured differently but should accommodate these functions at a minimum. Your specific team structure will also depend on whether your CoEI is scoped specifically to manage ServiceNow or to IT service management or enterprise service management more broadly.

### 3. Define the critical roles for your CoEI functions.

Your CoEI functions should include the following roles:

- **Strategy** – The CoEI strategy team should be led by the ServiceNow platform owner, who has overall accountability for the oversight of the Now Platform. This individual provides

leadership and oversight to other CoEI teams, ensures CoEI alignment with your business objectives and the ServiceNow roadmap, and typically presides over your governance functions. Responsibilities may include:

- Leading the team's alignment with the business strategy, roadmap, and platform governance policies
- Articulating the vision and business value of building, supporting, and developing the platform
- Owning and overseeing the ServiceNow instances overall
- Managing and overseeing application escalations
- Actively contributing to ServiceNow governance functions

Make sure your platform owner has skills in enterprise and/or IT service management, IT financial management, and ServiceNow management.

- **Business engagement and delivery** – A development lead should head the business engagement component of this team and may initially include product owners for ServiceNow capabilities (as applicable), business analysts, and training and communications specialists. See the Appendix for descriptions for each of these roles.

#### Should development be housed in the CoEI or in business lines?

Initially, you'll most likely house development activities inside the CoEI and support them with partner resources as needed—that is, if your organization doesn't have a lot of experience with ServiceNow.

But as demand and business familiarity with ServiceNow grows, start moving development activities to business line development teams, taking advantage of the Now Platform's low/no-code capabilities where appropriate.

As you mature, your development lead should take on more of a governance, advisory, and leadership role rather than remain directly responsible for development. The structure of your development activities also depends on your business context and instance strategy: In decentralized organizations with multiple instances, you may have several development leads overseeing development teams aligned with individual business units and instances. See the Appendix for a depiction of this model.

In organizations with mature Agile practices, make sure the development lead is a seasoned scrum master who can lead a scrum of scrums to coordinate, synchronize, and manage dependencies across the scrum teams leading development on the Now Platform in business lines.

Note that *testing* should be centralized. Your development lead should define testing standards and best practices to include unit and user acceptance testing and use of the ServiceNow Automated Test Framework. In some organizations (see the Appendix), the platform architecture and support team may include dedicated resources for testing and QA.



- **Platform architecture and support** – The leader of this function should be a ServiceNow platform architect, and the function should have system administrators, security and access administrators, and data owners supporting it. See the Appendix for descriptions of these roles.
- **Innovation** – The leader of this function should be an *experience architect* who uses human-centered design thinking to deliver innovative products and services from concept to completion. The architect will lead design efforts that improve and transform the products and services that employees and customers use and may also have these responsibilities:
  - Partnering with IT teams to identify opportunities to transform experiences for customers and employees with end-to-end digital workflows
  - Developing customer and employee personas and measures to quantify the business impact of suboptimal experiences
  - Auditing existing workflows and developing blueprints for new workflow experiences and identifying opportunities for improvement and experimentation
  - Assisting IT leaders in working with cross-functional partners to define customer journeys and digital workflow needs
  - Designing new touchpoints to evolve in-person and digital experiences
  - Translating aspects and components of the workflow experience to new channels and contexts
  - Creating seamlessly integrated service experiences with other enterprise digital platforms

Ideally, this role should coach or nudge business lines toward self-service in adoption, opportunity-spotting, and development of new capabilities on the Now Platform. For more on self-service, see our Success Playbook on [improving self-service with ServiceNow](#).

This function will also aid in demand management, so make sure that your innovation team communicates regularly with your demand board. See the Appendix for more information on this role.

### How many staff members will I need for my CoEI?

The total headcount you'll need for your CoEI depends on several factors, including:

1. The volume and diversity of demands for ServiceNow capabilities
2. The complexity of demands for ServiceNow capabilities
3. The reach of your ServiceNow implementation in terms of geographies and user populations
4. Your requirements for global master data management
5. Your organizational experience with ServiceNow
6. The maturity of your current workflows and processes
7. The maturity of your current governance processes
8. The strength and maturity of your partner support

You will likely already have substantial headcount in place for platform administration and development (with development in business lines, depending on your maturity). But as you scale, some of the factors listed above may require you to staff more specialized and dedicated roles—greater volume and diversity of demand may require you to put more training, communications, and OCM specialists in place.

Other factors may lead you to fewer CoEI staff. For example, as organizational expertise with ServiceNow grows, you should be able to shift more resources to business lines (and/or use partners to manage demand spikes).

The most important consideration in staffing is to ensure you have the right leadership roles (platform owner, platform architect, development lead, and experience architect) in place for each of the functions outlined above to be sure that your buildout continues to support your business vision and objectives. With core leadership in place for each of your CoEI functions, the headcount you add will be a matter of your business context and need.

See our Success Quick Answer, [How many people are needed to run the Now Platform?](#), for additional details.

## Customer insights

Our customers' experience points to three insights you should keep in mind as you define your strategy.

#### INSIGHT 1:

### Align the CoEI's charter and functions to your stage of maturity with ServiceNow

Your progress on your implementation roadmap should guide the phased standup of your CoEI. Start by ensuring that you have sufficient resources in place for platform architecture and support to ensure platform stability and usability. At this stage, you should identify leadership roles for other CoEI functions, but staffing your platform team should take priority.

Once you have the appropriate resources in place, put a plan in place to meet demands for new capabilities that can be supported by your strategy, business engagement, and delivery functions. With effective governance in place, you can begin to support innovation.

#### Best practice – Define a roadmap for your CoEI

You should have a roadmap (running parallel to your roadmap for ServiceNow) that defines your planned phases of CoEI implementation and that's tied to your establishment of governance and demand management. The roadmap can help to communicate the go-live for different CoEI activities and guide your staffing requirements.

See Figure 4 for the typical phases of a CoEI roadmap that's aligned with the maturity of your Now Platform implementation. Your goal should be to position ServiceNow as an enterprise strategic platform, delivering innovation (not just scale) against new business demands and converging services delivered to support IT, HR, and other functions.

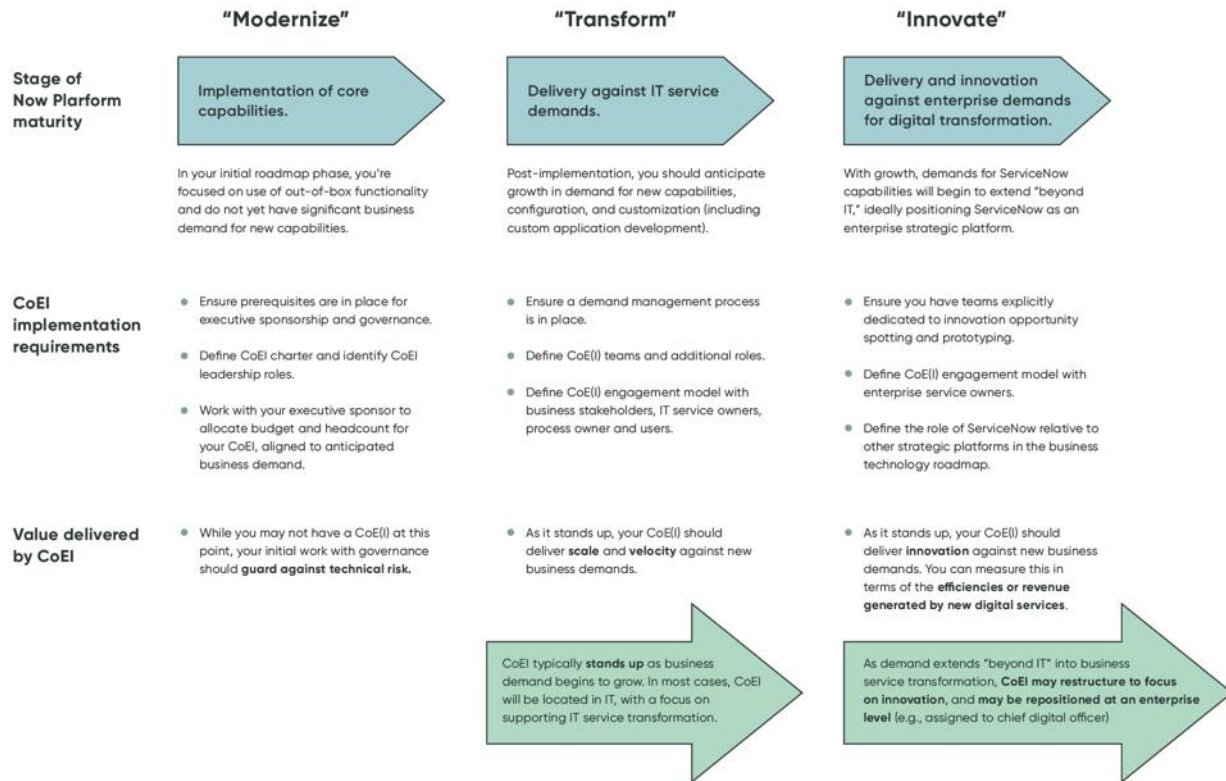


Figure 4: CoEI roadmap phases (See our Success Playbook on [where to start the implementation journey with ServiceNow](#) for guidance on phased roadmap implementation.)

## INSIGHT 2:

### Focus your staffing on the hard problems that the CoEI needs to solve to improve velocity and scale

The insight behind the roadmap in Figure 4 is that the hard problems that the CoEI needs to solve will change over time, requiring changes in the staffing configuration of your CoEI. The sequence that most organizations will go through as they mature looks like Table 1.

| Problem  | CoEI emphasis  |
|--|--|
| Migrate processes, services, and applications to ServiceNow    | <ul style="list-style-type: none"> <li>• Build platform stability and usability</li> <li>• Develop requirements and project planning for migration (including testing)</li> <li>• Develop an architecture strategy</li> <li>• Build foundational training and OCM to support migration</li> </ul>  |
| Develop new capabilities on ServiceNow to meet business demand | <ul style="list-style-type: none"> <li>• Mature demand management and prioritization</li> <li>• Scale development (and shift development to business lines where possible)</li> <li>• Manage technical standards and best practices</li> <li>• Build robust, scalable testing</li> <li>• Evolve the architecture strategy and roadmap</li> </ul> |
| Expand ServiceNow use  | <ul style="list-style-type: none"> <li>• Identify and scale innovation</li> <li>• Position ServiceNow as an enterprise strategic platform—and develop strategic insight as you converge services across the enterprise</li> <li>• Grow and mature self-service capabilities</li> <li>• Evolve employee and customer experience</li> </ul>        |

Table 1: Changes in CoEI emphasis as problems evolve

The point behind Table 1 is that your initial focus will emphasize the role of your platform architecture and support function, but later stages will emphasize the role of your business engagement and delivery and innovation teams. This should also influence how you develop staffing for your CoEI. You'll likely already have team members in place who can provide core staffing for platform architecture and support and business engagement and delivery. As you mature, you can add additional staff for business engagement and delivery, innovation, and strategy.

### Best practice – Ensure your business analysts can lead business partners in workflow design

There's a risk in defaulting to conventional business analysis and/or demand management when setting up your business engagement function for ServiceNow. The difference between ServiceNow and other strategic platforms is that workflow design and automation is likely to be a new concept and capability for many business partners, such that they may not be aware of the “art of the possible.” Because of this, your ServiceNow CoEI business analysts should be workflow design experts—ideally, with expertise in business process consulting as well as standard business analysis—who can spot opportunities to digitize workflows and help business partners redesign/remap workflows on ServiceNow, in collaboration with your experience

architect. For more background on this, see our Success Playbook on [reimagining how you want your work processes to flow](#).

### **Best practice – Focus your business engagement and delivery team on shaping demand**

As your demand for ServiceNow capabilities grows, your demand intake process can get overwhelmed by requests that may be redundant, that may lack clear business value, and that may divert the attention of your governance functions from more important priorities. Your business engagement and delivery team plays a critical role in pivoting your CoEI from demand-taker to demand-shaper.

With effective demand shaping, you make sure that the business demands that enter your intake funnel are informed and support your priorities for digital transformation. To do this, your business engagement and delivery team should:

- Proactively meet with and educate business stakeholders (including IT business relationship managers, line-of-business leaders, and leaders/managers of process users, like your IT service desk leads) on ServiceNow capabilities and your planned roadmap. Your initial “roadshow,” supported by your platform owner, should:
  - Take place as your CoEI is standing up
  - Include clear examples of the kinds of demands that ServiceNow can address
- Establish a regular meeting cadence and communications with business stakeholders. The product owners in your business engagement and delivery function should be responsible for capturing and prioritizing business demands from idea to execution. Whenever possible, communicate using ServiceNow [Project Portfolio Management](#) to ensure consistent visibility into demand as it progresses.
- Socialize the business value criteria established by your strategic governance function to evaluate incoming demands.
- Help business partners understand the cost/budget associated with different types of demand.
- Publicize best practice examples of new capabilities or functionality added to ServiceNow. Use stories to highlight either recent demands met by the CoEI or innovation opportunities you’ve captured. To shape demand effectively, your stories should:
  - Define the business opportunity. Techniques from Agile development can help frame your stories.
  - Clearly (and briefly) explain how the demand board evaluated and prioritized the opportunity.

- To the greatest extent possible, show the business value you've realized from addressing the opportunity, relative to the cost of delivery. This should focus on storytelling, rather than using extensive financials. Here are a few examples of these types of stories.

#### Examples of stories that highlight new ServiceNow capabilities

##### Define the business opportunity:

*In EMEA, sales leaders standing up new offices needed to cut the amount of time required to access region-specific procurement software, which was not included in our service request catalog.*

##### Explain your evaluation and prioritization:

*Our demand board realized that this request needed to be prioritized, based on our business objective to open three new regional offices in H2 to expand our EMEA market.*

##### Show business value realized, relative to cost:

*Our ServiceNow Center of Excellence and Innovation allocated two developers to implement this item in our EMEA service request catalog in a week, enabling these offices to open at least one week earlier in our most critical sales quarter.*

### Best practice – Work with HR to define CoEI career paths that align with your ServiceNow roadmap

To attract the best possible talent to your CoEI, your platform owner should define a talent strategy that shows how CoEI roles will progress as your ServiceNow roadmap evolves and usage grows across the enterprise. This should include:

- **Opportunities for specialization** – For example, in specific ServiceNow products or skills like OCM
- **Opportunities for migration across teams** – For example, from the business analyst role to the experience architect role
- **Opportunities for greater responsibility and leadership** – For example, from the system administrator to development lead

### What to do next

The CoEI should not be an island. Support the charter and functions of the CoEI with a clear engagement and service delivery model with key stakeholders, including service owners, process owners, and business partners.

## Step 3 – Define your engagement and delivery model with business, service, and process owners

### KEY INSIGHTS

- Be clear about the big picture. Show how the CoEI interacts with your strategic governance and demand management functions for ServiceNow, your service and process managers and/or owners, and other CoEs to deliver on enterprise demands.
- Orient your operations and engagement model around the delivery of “ServiceNow as a Service” to meet enterprise demands.

The CoEI may not be the first team you've stood up to manage ServiceNow or engage in process and service transformation. Your organization likely has process, service, and workflow owners in place. When you establish your CoEI, it's critical to define the roles, responsibilities, and authorities of your CoEI teams, relative to these consumers of ServiceNow capabilities, to avoid decision-making confusion, perceptions of redundancy, and resistance to change.

Complete these action steps to define your CoEI's engagement and delivery model.

#### 1. Define clear responsibilities and accountabilities with CoEI stakeholders.

The charter for your CoEI should include RACIs (or similar decision-making frameworks) that clearly delineate the responsibilities and accountabilities of the CoEI relative to your:

- Strategic, portfolio, and technical governance functions
- Demand and design boards
- Development teams building on ServiceNow
- Service owners and managers
- Process owners and managers

Your RACI should reinforce the role of the CoEI in execution and value delivery against demand, especially relative to business partners, service owners, process owners, and development teams.

For each of the questions below, separate the responsibility of the CoEI from the accountability of your governance functions:

- **Who defines and approves the ServiceNow roadmap?** Be clear that the CoEI is not a substitute for your strategic governance function (including your executive sponsor). The



CoEI strategy team can build the roadmap for deploying ServiceNow capabilities, but approval should rest with your [strategic governance function](#).

- **Who prioritizes the demand backlog?** Be clear that the CoEI is not a substitute for having an effective demand board to manage demands for customization, configuration, or expansion of services on the Now Platform. Your CoEI business engagement and delivery team can build the backlog, but final prioritization authority should rest with your demand board. For more on the role of the demand board, see our Success Playbook on [managing platform demand](#).
- **Who defines architectural and technical standards?** Your CoEI's platform architecture and support team should be responsible for defining technical standards and best practices and for approval by your technical governance function. However, you should also be clear that the CoEI is not a substitute for a design board that reviews and drives design decisions around approved global demands.

For each of the questions below, separate the responsibility of the CoEI from the accountability of process and service owners and other business stakeholders:

- **Who's responsible for the processes and services running on ServiceNow?** While the CoEI is responsible for the performance of processes (such as IT change management) and services (like enterprise onboarding) on the Now Platform, process and service owners should remain accountable for process and service outcomes and management. The CoEI should collaborate with process and service owners and managers to determine how best to optimize process and service performance, cost, and experience, using ServiceNow capabilities.
- **Who manages the portfolio of ServiceNow capabilities?** The CoEI should be responsible and accountable for the technical maintenance of ServiceNow applications (including both ServiceNow products and custom applications), but each application—especially custom applications—should have clear business ownership and accountability. This can be vested in designated service and/or process owners, who should be accountable for ensuring that the workflow, process, and/or service running on the Now Platform is delivering value in line with business objectives. A simple and illustrative example is the service request catalog: The CoEI is accountable for technical maintenance of the catalog, but the owners for individual catalog items should be accountable (and responsible) for keeping their items up to date.

Use the RACI chart in Table 2 as your baseline.

| Activity   | CoEI   | Governance functions   | Demand and design boards   | Service owners and managers   | Process owners and managers   | Dev teams (outside the CoEI)  |
|--|--|--|--|---|---|---|
| <b>Develop the ServiceNow roadmap</b>                                  | Responsible for roadmap development  | Accountable for the roadmap  | Informed   | Consulted and Informed  | Consulted and informed  | Informed  |
| <b>Define architecture and technical standards and best practices</b>  | Responsible for standards and best practice definition   | Accountable for approving standards and best practices               | Responsible for approving design adherence to standards            | Consulted and informed  | Consulted and informed  | Consulted and informed  |
| <b>Manage demand intake and prioritization</b>                         | Responsible for intake and assigning demand requests   | Consulted and informed   | Accountable for demand approval and prioritization                 | Consulted and informed  | Consulted and informed  | Informed  |
| <b>Manage process performance</b>                                      | Responsible for process design and optimizing on the Now Platform                              | Consulted  | Informed   | Informed  | Responsible for process definition and accountable for service performance                              | Informed  |
| <b>Manage service performance</b>                                      | Responsible for service design and optimizing on the Now Platform                              | Consulted  | Informed   | Responsible for service definition and accountable for service performance                              | Informed  | Informed  |
| <b>Develop new applications, customizations, and/or configurations</b> | May be responsible for development; accountable for on-time, on-budget, quality in development | Informed   | Responsible for approving design adherence to standards            | Consulted (if development affects service performance)  | Consulted (if development affects process performance)  | May be responsible for development  |
| <b>Manage portfolio of ServiceNow applications</b>                     | Responsible for supporting applications on the Now Platform                                    | Accountable for defining portfolio management policies and standards | Responsible and accountable for administering portfolio governance | May be accountable for application support cost and usage (for applications owned by the service owner) | May be accountable for application support cost and usage (for applications owned by the process owner) | May be accountable for application support and usage (for applications owned by business lines) |

Table 2: Example RACI chart for a ServiceNow CoEI and stakeholders

Note that your governance functions, including your demand and design boards, should include both CoEI staff as well as service and process owners where appropriate. Governance functions essentially act as a glue that connects your CoEI to these key stakeholders—and you should aim for a single, consistent set of governance functions across your service offerings (IT workflows, employee workflows, customer workflows). For a list of recommended memberships in your governance functions, see our Success Playbook on [building a dedicated, dynamic](#)

governance process, policies, and team. See Figure 5 for a depiction of how your governance functions should connect your CoEI to development teams, service owners, and process owners.

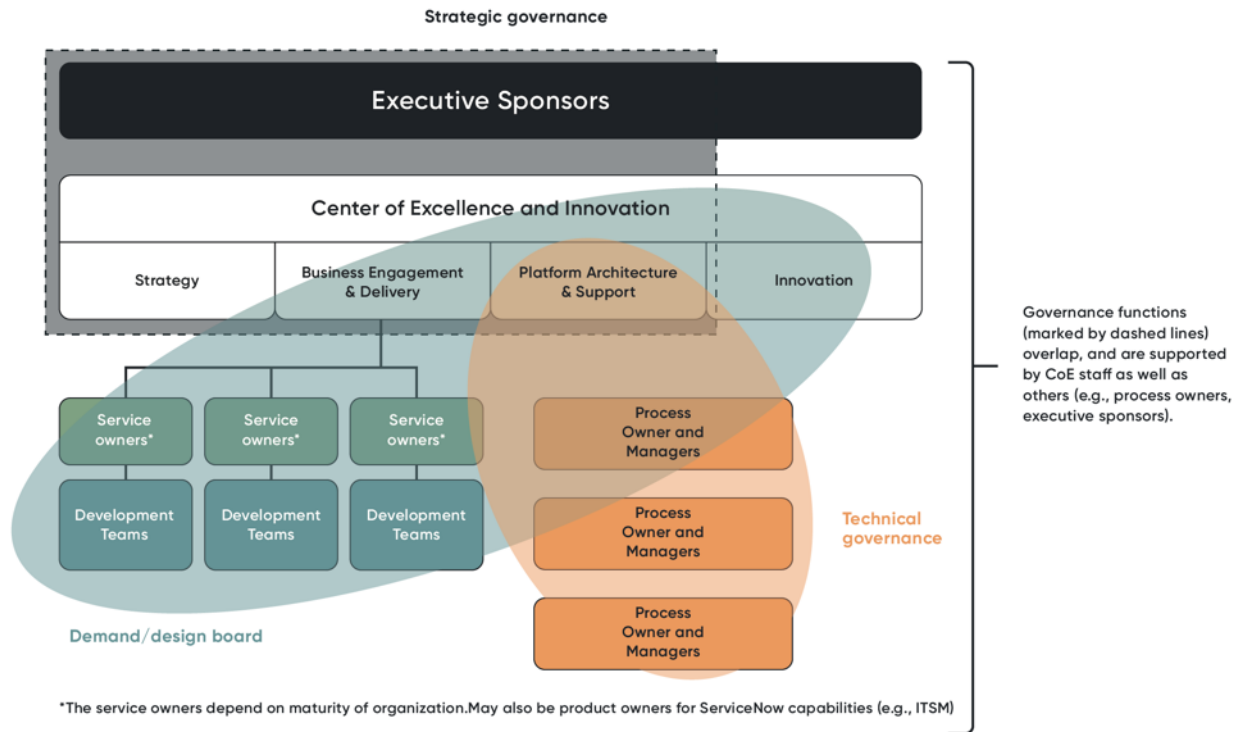


Figure 5: Governance overlays across a ServiceNow CoEI and stakeholders

### How should the ServiceNow CoEI engage with other Centers of Excellence?

It's likely your organization will have Centers of Excellence in place for other strategic platforms (like ERP or CRM) and disciplines (such as IT service management or HR service delivery). Assuming these centers remain separate, your engagement model/RACI will need to account for:

- **CoEs for other strategic platforms (like ERP):**
  - Establish regular communications between your strategy functions to make sure your roadmaps are aligned, account for any shared dependencies (integration or global master data for example), and avoid redundant projects or effort.
  - Make sure your governance approaches between your strategy and platform architecture functions consistent to avoid confusion among business customers.
  - Establish ServiceNow as your primary system across your business engagement functions for adjudicating enterprise-wide demand across platforms. See Figure 6 later in this section for more information.
  - Share OCM communications across your business engagement functions to avoid conflicting messaging.
  - Promote idea sharing across your innovation functions.
- **CoEs for strategic disciplines:**
  - Establish regular communications between your strategy functions to identify shared roadmap priorities or opportunities (such as deploying new ServiceNow capabilities to support ITSM initiatives).
  - Establish consistent standards and governance across your business engagement and platform architecture functions for process configuration and consistency.
  - Collaborate across your business engagement functions for the development of training and OCM plans.
  - Promote idea sharing and collaboration across your innovation functions.

## 2. Define an engagement framework and channels with CoEI customers.

As you build out your RACI, the I CoEI function leaders should determine how they'll engage with business stakeholders, service owners and managers, and process owners and managers. This should include channels for demand intake, reporting, and communications.

For *demand intake*, you should (ideally) use ServiceNow to collect, organize, and provide visibility into demands across your stakeholders. Your product owners on your business delivery team should also help your stakeholders vet and prioritize demands, especially so the local demands that business line teams can handle are kept at the local level—and not moved into the CoEI's demand funnel.

### What demands should be handled at a local level instead of by the CoEI?

As you grow development and support capabilities in business lines, less complex demands (like simple configurations) and demands that can be handled through scoped development don't need to be factored into your CoEI's backlog. Reserve demand board and CoEI attention for demands that involve:

- Global master changes or global applications
- Complex, cross-platform demands
- New capabilities to be implemented
- Changes outside the scope of an individual business line (such as changes to your service portal)

As you scale, some of these factors may require you to staff more specialized and dedicated roles—greater volume and diversity of demand may require you to put more training, communications, and OCM specialists in place. Other factors may lead you to fewer CoEI staff. For example, as organizational expertise with ServiceNow grows, you should be able to shift development resources to business lines (and/or use partners to manage demand spikes for development).

For *reporting*, determine the metrics/KPIs you will provide to each stakeholder consistently, and the cadence you'll provide them. You can use [ServiceNow Performance Analytics](#) to support this. See our Success Quick Answer on [creating custom dashboards](#), for guidance on creating reports for service owners, process owners, and business executives.

For *communications*, your strategy and business engagement and delivery teams should determine the audience, cadence, and messaging that will align with your OCM strategy. See our Success Quick Answer on [how to build an OCM communications plan](#) for more guidance.

You can drive transparency, scale, and adoption by incorporating as much of this in ServiceNow as possible, but supplement this with face-to-face interaction with your most critical customers, especially as you develop your understanding of your audience's needs and objectives.

In organizations with dedicated IT-business relationship management (BRM) roles, make sure that your BRMs:

- Are armed with sufficient ServiceNow knowledge
- Have the right messaging to support your communications plan
- Are supported by your business analysts

Depending on the scale and diversity of your customer base, you may also have senior business analysts act as dedicated relationship managers for ServiceNow for specific business lines, at least until these audiences can effectively self-serve using the capabilities available on the Now Platform.

## Customer insights

Our customers' experience points to three insights you should keep in mind as you define your platform vision.

### INSIGHT 1:

#### Be clear about the big picture—show how the CoEI interacts with other roles and functions to deliver on enterprise demands

The biggest risk in introducing a ServiceNow CoEI is organizational confusion. Even if you have a RACI chart in place, the CoEI's day-to-day responsibilities and accountabilities may appear unclear, relative to existing teams, working groups, and other CoEs. In the worst-case scenario, this leads to "renaming," so your platform operations/support team is relabeled as a CoEI but fails to take on any additional responsibilities. Start by showing the big picture of how the CoEI executes its responsibilities, relative to other functions.

#### Best practice – Show the role of the CoEI in the “demand funnel,” relative to other functions

A RACI may not be sufficient to demonstrate the role of the CoEI relative to other functions. Create a one-page depiction of how *all* of your strategic platforms address enterprise demand—from the top of the “demand funnel”—and the role of the ServiceNow CoEI within that. See Figure 6 for an example.

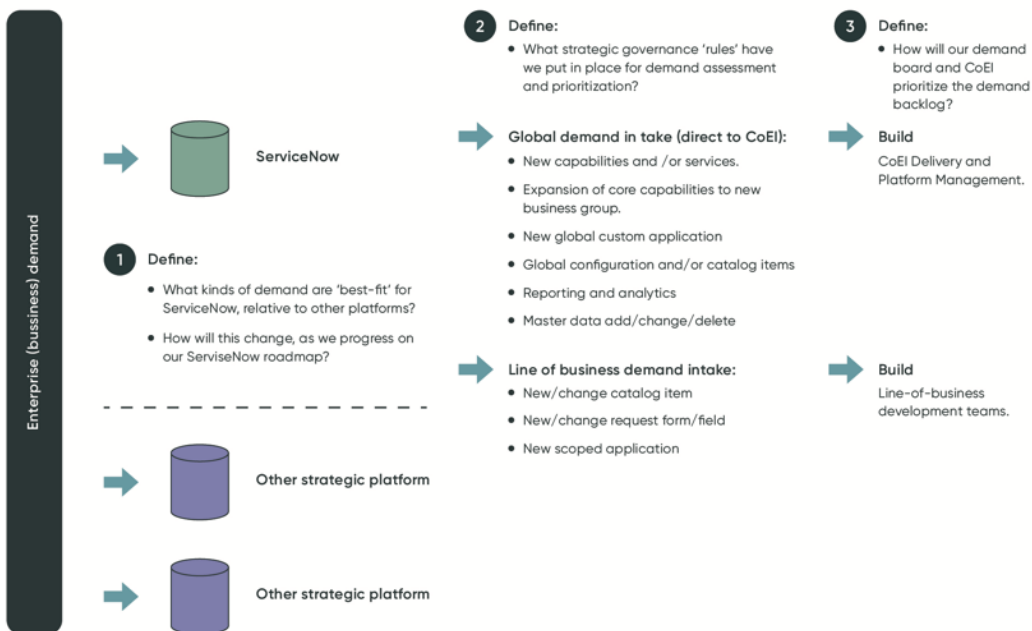


Figure 6: Overview of big picture questions to show the CoEI's role in demand intake and prioritization

Your big picture should answer a few critical questions:

- **At the top of the demand funnel, how do we determine which enterprise demands are best fit for ServiceNow?** Your executive sponsor(s)—with the support of your enterprise architecture function as well as leadership teams for your other platforms (such as your ERP, CRM, etc.)—should define guidelines for when a new business demand is best met by ServiceNow relative to other platforms. Begin your evaluation of ServiceNow's potential at the enterprise level, as early as possible in the idea phase of a demand so you capture best-fit demands for ServiceNow. You can use a few “litmus test” questions to aid in defining these guidelines:
  - Is the demand to improve the efficiency or experience of a workflow or process?
  - Is the demand to simplify employee or customer engagement with a workflow or service?

#### Use ServiceNow IT Business Management capabilities to master enterprise demand

ServiceNow [IT Business Management](#) capabilities provide a centralized view of all enterprise business and IT requests to streamline your investment planning. This means that you can use ServiceNow to adjudicate all demands at the top of the demand funnel for ServiceNow and other strategic platforms.

- **Who sets the rules for prioritizing demands for ServiceNow?** Your strategic governance function—which can include CoEI leadership but should not be part of the CoEI—should set the criteria for prioritizing your backlog.
- **Who prioritizes the demand backlog?** Your demand board—which, again, can include CoEI staff, but is not part of the CoEI—should hold responsibility for prioritizing the backlog.

Your net result should show that the CoEI is responsible and accountable for delivery against demands to improve workflow and workflow experiences. See Table 3 for additional litmus tests to find a demand's fit with ServiceNow that can be built into enterprise reference architecture materials.

**ServiceNow digital workflows can transform manual processes that span multiple systems where development is slow and functionality isn't reusable, relies on complex infrastructure, and presents legacy experiences.**

| Good fit   | Bad fit   |
|--|---|
| <ul style="list-style-type: none"> <li>• Extensive use of forms to interact with data</li> <li>• Automation of a manual and repeatable business process               <ul style="list-style-type: none"> <li>– New tables and table inheritance</li> <li>– Workflow</li> <li>– Data lookup</li> <li>– Single portal</li> <li>– Machine learning</li> <li>– REST APIs</li> </ul> </li> <li>• Data can be modeled in a relation database               <ul style="list-style-type: none"> <li>– Requires reporting and analytics capabilities</li> <li>– Extensible and/or reusable</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• One-time tasks</li> <li>• Data is unstructured or analog (such as audio or video)</li> <li>• Requires access to proprietary libraries that do not have an API</li> <li>• Applications requiring graphics engines</li> <li>• Applications with no process flow</li> <li>• Document storage or enterprise content management</li> <li>• Complex calculations</li> <li>• High-compute resources (like blockchain applications)</li> </ul> |

*Table 3: Guidance for determining good fits for ServiceNow development*



#### INSIGHT 2:

### **Orient your operations and engagement model around the delivery of 'ServiceNow as a Service' to meet enterprise demands**

The value delivered by your CoEI depends on effective engagement with your service and process owners and managers (see the Glossary for our definition of these roles), especially if these roles are distributed or decentralized across business lines. In addition to a baseline RACI, show how the ServiceNow CoEI delivers ServiceNow capabilities "as a service" to meet the demands of consumers, especially service and process owners and managers.

#### **Best practice – Define the service offerings the ServiceNow CoEI provides to business stakeholders**

Your strategy and business engagement resources should codify CoEI activities as service offerings, made available to your service owners, process owners, and other business stakeholders through your service catalog. These should include a description of each offering, SLA commitments, financials (costing for development and support), and descriptions of how the work is typically performed or delivered. See Table 3 for a starter list of CoEI service offerings and descriptions.

| ServiceNow as a Service offering                       | Description   |
|--|---|
| New capabilities                                       | Creation of new capabilities not currently offered. May be ServiceNow products or custom applications |
| Upgrades   | Migration of the Now Platform to new version, allowing access to new capabilities.                    |
| Onboarding to the Now Platform                         | Introduction of new departments, regions, and/or user bases into the Now Platform                     |
| Workflow and experience optimization                   | Evaluation and optimization of existing workflows and experiences using the Now Platform              |
| Reporting and analytics                                | Creation and/or updates of reports, analytics, and dashboards   |
| Catalog item entry                                     | Creation or update to items in the service/request catalog  |
| Configuration or customization of current capabilities | Changes to out-of-the-box functionality and/or experience based on business need                      |
| Role/group creation and/or assignment                  | Creation and assignment of workflow groups and roles, including access and approval rights            |
| User training  | Delivery of general and targeted training for process user and end-user groups                        |
| Master data entry and/or data cleanup                  | Updates or changes to the ServiceNow data schema  |

Table 3: Starter list of CoEI service offerings for ServiceNow as a Service (SLA commitments and financials will depend on your specific organizational context.)

### Best practice – Set clear engagement commitments as you onboard your customers.

As with any service offering, you should establish clear, explicit commitments with your business stakeholders as you launch a new capability or onboard a new user population or business line into the Now Platform. Your business engagement team should address the following questions with your business lines, service owners, and process owners to ensure you have the right expectations in place between the CoEI and its customers:

- How will we recover license costs as we onboard or add user licenses?

- Will lines of business staff their own system administrators or developers to manage local demand, either now or at a future point? Will we grant access to “citizen developers”?
- How will build and support costs borne by the CoEI be calculated and recovered?
- What SLAs will we establish for incident response/recovery and for any central development?
- Will projects be managed within the business line or the CoEI (with funding provided by the business line)?
- What sourcing options will be made available to support projects (like partner versus in-house staffing)?

The mind shift implied by these questions is that CoEI leadership needs to approach engagement as the organization’s business owners for ServiceNow rather than as technical managers.

**Best practice – Show the deliverables required from both the ServiceNow CoEI and line-of-business service and process owners at each stage of the demand cycle for service offerings**

To make your RACI actionable, depict the specific items or decisions required from ServiceNow providers (your CoEI) and consumers as you deliver ServiceNow as a Service offerings to meet demand. See Figure 7 for an example based on delivering new ServiceNow capabilities.

In the build phase of the demand-to-release cycle, for example, the service and/or process owner is responsible (with the support of project managers and business analysts) for delivering requirements. The CoEI’s business engagement and delivery team is responsible for coordinating development teams to deliver code against these requirements (with the support of the platform architecture and support team, as required) that subsequently moves into the next phase of the demand-to-release cycle (testing).

## Demand-to-release cycle

| Function(s)                             | Deliverables   |               | Function(s)  | Deliverables   |
|---|--|---------------|--|--|
| CoEI Business Engagement and Innovation | Idea assessment and approval   | Idea          | Business leads<br>Service/process owners<br>Executive sponsor(s) | Idea submission  |
| CoEI Strategy                           | ServiceNow roadmap<br>Engagement model   | Business case | Business leads<br>Service/process owners<br>Executive sponsor(s) | Business needs<br>Business case<br>Budget  |
| Demand Board Design Board               | Demand assessment and approval<br>Estimates, risks, prioritization                             | Demand        | Business leads<br>Service/process owners                         | Value assessment<br>Funding<br>High-level requirements   |
| CoEI Delivery and Platform Management   | Resource plan (inc sourcing.)<br>Project prioritization  | Portfolio     |  |  |
| CoEI Delivery and Platform Management   | Resource allocation<br>Project plan<br>QA plan   | Plan          | Business/<br>process owners                                      | Resource commitment (including project mgrs., business analysts)<br>Service and/or process artifacts |
| CoEI Delivery and Platform Management   | Development/burn down<br>Code review<br>Unit & functional tests                                | Build         | Service/<br>process owner  | Derailed requirements  |
| CoEI Delivery and Platform Management   | Remediation<br>Entry/exit criteria   | Test          | Service/process owners<br>Process users                          | Test cases<br>User acceptance testing  |
| CoEI business Engagement and Innovation | Deployment, training, and communications support<br>Knowledge transfer and article development | Release       | Service/<br>process owners                                       | OCM plan<br>Knowledge article development  |
| CoEI Strategy                           | Value measurement and roadmap development  | Value         | Service/<br>process owners                                       | Value measurement and reporting  |

Figure 7: CoEI functions and deliverables for supporting ServiceNow as a Service through the demand-to-release cycle

### INSIGHT 3:

#### **Collaborate with stakeholders to promote and evolve best-in-class standards for design, development, and adoption**

In nearly every organization, the success of the ServiceNow CoEI will be based on the extent of its influence, not just its authority. This means that CoEI activities should not be a one-way street, whether that's in terms of development to meet business demands, identification of innovation opportunities, or training and communication strategies to facilitate adoption. The best strategies approach the interactions depicted in Figure 6 as an opportunity to collaborate, influence, and improve the standards you have in place—from design to delivery. The business consumers for your CoEI's service offerings should have a voice in how your offerings are shaped and delivered, as well as influenced by the experts in your CoEI.

#### **Best practice – Build communities of practice to share learnings across service owners, process owners, business line development teams, and other stakeholders**

The consumers of your ServiceNow as a Service offerings should not be siloed. Make sure your business engagement and delivery function builds communities of practice among consumers, including service owners, process owners, and development teams, to share learnings from their engagement with the CoEI and use of ServiceNow capabilities. Communities of practice should be kept simple, constructed through knowledge management, and/or regular meetups, and run by consumers to ensure effective peer-to-peer exchange. Your innovation function and product owners can play critical roles in facilitating communities of practice.

#### **Best practice – Define relationships with other CoEs for strategic platforms to promote consistency in user experience, demand management, and business engagement**

As shown earlier, your ServiceNow CoEI will likely exist alongside other CoEs for other technology platforms. Your relationship with other CoEs isn't limited to the top of the demand funnel, as depicted earlier. To the best extent possible, your CoEI strategy function should work with other CoE leadership teams to:

- Continue to refine your evaluation criteria for best-fit platforms for new demand, especially as platform capabilities change
- Identify opportunities for integration, data-sharing, and roadmap harmonization
- Ensure consistency in how each platform approaches demand management (especially when evaluating business value criteria) and the demand-to-release cycle
- Ensure consistency in user experience standards
- Share best practices and find efficiencies (including potential opportunities for consolidation) in business engagement, training, communications, and support for OCM

## What to do next

Make sure the model you've set up for your CoEI and ServiceNow as a Service is sustainable and has appropriate resourcing to meet demand.

## Step 4 – Define the right resourcing model

### KEY INSIGHTS

- Resource for long-term potential and competency, not just short-term skill needs.
- Lead business partners toward self-service.
- Maintain an Agile capacity to respond to short-term requirements that present highly visible innovation opportunities.

The top pitfall organizations face when standing up a ServiceNow CoEI is to under resource the function while over scoping its rollout.

This under resourcing can be a matter of having too few staff to deliver against demand or failing to invest in the right skills for the roles outlined in Step 2—roles that can effectively advance your roadmap and vision for ServiceNow. When this happens, it's usually due to an overreliance on project-based funding for the CoEI as opposed to budget-based funding.

Complete three action steps to build and support your resourcing model.

### 1. **Allocate a line-item budget to stand up your CoEI that's aligned with the scope of your ServiceNow implementation.**

Establish your initial headcount and funding estimates for your CoEI functions based on:

- The number of applications you've implemented and plan to implement
- The maturity of processes and/or services you plan to migrate to ServiceNow
- The volume and diversity of the demand you anticipate (which should correlate to usage)
- The complexity of the demand you anticipate, based on your rate of organizational change (M&A, for example), complexity of system integrations, and customization requirements

See our Success Quick Answer called [How many people are needed to run the Now Platform?](#) for more details. If you already have a platform operations/support team in place, this function can provide the core headcount you need for your CoEI.

Your initial budget should account for at least 30–40% of the funding you will need for your CoEI, with your remaining funding provided through project-based chargeback, both for build and support activities, tied to your ServiceNow as a Service offerings (as outlined in

Step 3). This way, you know that your CoEI has critical roles and activities in place before you begin demand intake.

## 2. Define your project-based funding and sourcing models.

Work with your PMO, IT finance team, and procurement functions to establish standard project-based funding for the introduction of new capabilities, department/region onboarding to the Now Platform, and other CoEI activities that drive platform expansion. Since demand will require the most headcount growth in developers, business analysts, and system administrators, make sure you have contracts in place with [certified partners](#) to allow your development and support efforts to scale quickly. This can also provide clarity into how you should set project-based funding requests (or showback/chargeback), as you see the level of effort/headcount required for different kinds of demand.

## 3. Build your value management strategy to protect and grow your budget.

Your budget needs to be accompanied by a parallel strategy for value measurement and management to show your business stakeholders clear return on their investment (whether through direct line-item budgeting for the CoEI or project-based chargeback). Ensure that your CoEI can deliver quick and highly visible wins early in your implementation as a demonstration of return. For more information on this, see our Success Checklists, [Build a phased program plan](#), [identify quick wins](#) and [Baseline and track performance, usage KPIs, and metrics](#).

### INSIGHT 1:

#### Resource for long-term potential and competency, not just for short-term skill needs

The urgency to meet demands for ServiceNow capability—or to advance the ServiceNow roadmap quickly—can put initial resourcing emphasis on solution architecture and development skills. Nearly every organization can be challenged to find these skills at the volume required in the short term—and this means that organizations can be tempted to hire for skills first, rather than for the leadership competencies and mindset needed to promote transformation and innovation. Organizations should take a two-track approach where possible: Continue to hire against short-term skill need, but look for opportunities to grow longer-term potential for skill development, innovation, engagement, and other competencies.

### Best practice – Build a “greenhouse” to grow ServiceNow CoEI talent

As one ServiceNow customer realized, the skills a person needs to support ServiceNow can be nurtured if that person has the right potential. This customer selected a team in a low-cost geography that initially had no ServiceNow skill sets but had a demonstrated competency for innovation and service delivery. Over the course of three years, the organization trained this team in the skills it needed to design and develop on the Now Platform, “growing” it into a source of development expertise as the CoEI expanded its scope. Discuss with your executive



sponsor where underutilized, low-cost talent exists in the organization, and groom those people for CoEI positions.

#### INSIGHT 2:

### Lead business partners toward self-service

The scalability of your CoEI resources will reach limits, even when it's supported by project-based funding. To avoid these limits, your CoEI business engagement and delivery team, with the support of your innovation team, should look to move business stakeholders to self-service wherever possible, especially in:

- Developing scoped applications
- Accessing and developing reports and dashboards
- Accessing knowledge resources for support
- Using ServiceNow capabilities for demand and project management

### Best practice – Coach business line development teams to take advantage of the low-/no-code development capabilities available in ServiceNow

Your business engagement and delivery team should, through both training and coaching programs, build competency in low-/no-code development on the Now Platform among developers across the enterprise. Projects should include business line development team members wherever possible (or even “citizen developers”), to learn from your CoEI team or partners. Also include ServiceNow certifications as part of your learning and development curriculum for all developers. Your development lead should also establish an on-call coaching service to aid business line development teams in building applications on the Now Platform. As a metric, you may also want to track the percentage of developers across the enterprise with training, experience, and/or certification with ServiceNow.

#### INSIGHT 3:

### Maintain an Agile capacity to respond to short-term requirements that present highly visible innovation opportunities

Inevitably, larger, slower-moving projects—like migrating business units from legacy systems—will pull in the majority of your ServiceNow development and platform operations/support resources, especially if these projects see changes in scope or timeline. For many organizations, this can mean deferring or deprioritizing opportunities that aren't as critical to your ServiceNow roadmap but could be highly visible wins. With the right resourcing, your CoEI can play a role in ensuring that these aren't missed opportunities for the organization.

### **Best practice – Set up one or more Agile teams in the CoEI that can be quickly moved to work on emerging opportunities**

Incorporate a number of developers (5–10% of your total ServiceNow developer population) to the CoEI that can act as reserve capacity to capture emerging innovation opportunities that might otherwise be under resourced. This team, reporting to your experience architect, should operate according to scrum principles and identify backlog opportunities that meet the following suggested criteria:

- New or emerging business needs not met by existing products or applications
- Needs that exist among stakeholders who are not yet familiar with ServiceNow or willing to advocate for ServiceNow
- A solution that has the potential for scale or replication to other teams and functions
- Minimum viable products that can be developed in small number (one to three) of one- or two-week sprints

Developers assigned to this team should have an innovation-oriented mindset and have the ability to clearly translate ambiguous or emerging needs into user stories (see the role description for the experience architect in Step 2 for more information). This can also provide a path to “grow” high-potential developers into future architecture and/or strategy leadership roles.

### **What to do next**

Just as resourcing should not be exclusively dependent on project-based funding, your operational cadence should not be solely determined by projects. Your next step is to establish an operating cadence that ensures effective management of your implementation, drives adoption growth, and builds enterprisewide return.

## Step 5 – Operationalize your CoEI and advance your vision for digital transformation

### KEY INSIGHTS

- Invest in regular upgrades to get ahead of demand.
- Build a team of champions within the CoEI and your customer base.
- Define CoEI success in terms of enterprise-wide transformation, convergence, and value creation.

The best ServiceNow customers have a disciplined approach to their CoEI's operations: Rather than manage only by the cadence of projects and programs, they make certain that their activities continuously improve the capabilities available through the Now Platform, organizational adoption, and business value delivery. The goal these customers have for their CoEI efforts is to advance the enterprise—not just IT—toward their vision for digital transformation, positioning ServiceNow as an enterprise strategic platform that supports that vision.

To finish standing up a true CoEI—rather than just a program management office—you'll complete three action steps. Note that these are in addition to standing up the governance and demand management processes described earlier in this document.

#### 1. Define your platform support and upgrade calendar.

Your *platform management team* should have project plans in place for Now Platform hygiene that include using HealthScan regularly—at for least annual upgrades.

#### 2. Define your training and communications calendar.

Your *business engagement and delivery team* should have a clear plan (tied to your delivery cadence) to make sure your OCM and adoption efforts are effective and tied to your backlog and rollout plans. Make this plan visible and supported by active champions among your service owners, process owners, and business lines.

#### 3. Define, monitor, and communicate value and performance measurement.

Your *strategy team* should build and manage a measurement framework, tied to your roadmap, that connects metrics for Now Platform management, process management, and service management up to business value creation and return on your ServiceNow investment. Critically, this should highlight improvements in productivity and experience outside of core IT, to advance the role of ServiceNow as an enterprise strategic platform.

#### 4. Define your roadmap for enterprise-level convergence.

Your strategy team should define a clear roadmap for consolidating enterprise-level processes and activities for business engagement and delivery, governance, and platform architecture and support. This way, you'll be able to advance ServiceNow as a strategic enterprise platform that's overseen by a single CoEI.

### Customer insights

Our customers' experience points to three insights you should keep in mind as you operationalize your CoEI and advance your platform vision.

#### INSIGHT 1:

##### Invest in regular upgrades to get ahead of demand

Too many organizations treat upgrades as something that's nice to have rather than something that's necessary due to competing priorities. This approach, however, can challenge your long-term ability to meet demand: Upgrades often deliver new functionality that can alleviate backlog pressures for customization and can deliver new functionality (like guided app creation) that can expand the Now Platform's reach across the enterprise.

#### **Best practice – Schedule project resources for upgrades, and review release notes relative to your backlog**

To make sure your upgrades are prioritized properly and get the right attention, approach them with formal, dedicated project management resources. You may want to budget for these resources at the start of the year to avoid having to lobby for scarce resources later. Your CoEI teams should also conduct a detailed reading of the release notes to identify new functionality or innovations that may:

- Reduce or eliminate backlog demands for customization (or make existing customizations unnecessary)
- Require you to set aside resources for platform team, developer, or process user training
- Require investment in OCM

For more on upgrade planning, see our Success Checklist on [planning for upgrades at least once a year](#).

#### **Best practice – Tie new functionality to innovation opportunities ahead of your upgrade**

As you review release notes in advance of an upgrade, your innovation team should be in opportunity-spotting mode. Identify and match new capabilities or functionality to business use cases, and proactively offer to develop pilots of these use cases as the upgrade is delivered. This should also be part of roadmap development in your strategy team and strategic governance

functions: Don't just plan the upgrade—plan for the new capabilities (for example, machine learning) that you will pilot, extend, and develop after you upgrade.

#### INSIGHT 2:

### **Build championship across the CoEI and your customers**

Each role in the CoEI should act as an ambassador or champion for ServiceNow as an enterprise strategic platform. Your business engagement and delivery team should ensure that everyone in the CoEI has access to a slide deck or other materials they can use to describe the role of ServiceNow in digitizing enterprise workflows—materials with examples from inside and outside IT.

#### **Best practice – Create champions from each development and innovation project**

Your business engagement and delivery team needs to make sure that it follows up each release with a customer satisfaction survey and solicitation of champions at both the management and process user levels. Because they're a communications channel to your user base, champions can both help to drive adoption and help identify where you have expansion and innovation opportunities. For more on this role, see our Success Quick Answers, [What is a ServiceNow champion?](#) and [How do I recruit ServiceNow champions?](#)

#### INSIGHT 3:

### **Define CoEI success in terms of enterprise-wide transformation, convergence, and value creation**

Your CoEI should, ideally, guard against technical and business risk, improve the scale and velocity of delivery with ServiceNow, and advance ServiceNow's role as an enterprise platform for digitizing workflows. The key is to establish traceability between your CoEI teams and the metrics that they should most directly influence to advance your CoEI's goals, aligned with the stage of your CoEI's maturity as discussed earlier (see Step 2, Figure 4 and Table 1).

#### **Best practice – Build a scorecard to assess your CoEI's effectiveness**

The metrics you put in place to support your ServiceNow implementation will help you assess the effectiveness of your CoEI. Most critically, you should isolate the metrics that best assess your progress in advancing the role of ServiceNow as a strategic enterprise platform for digital transformation. Table 4 shows a recommended CoEI scorecard that connects your CoEI teams to key metrics associated with your ServiceNow implementation.

| CoEI team                         | Metrics  | What to assess   |
|-----------------------------------|--|--|
| Strategy                          | <ul style="list-style-type: none"> <li>Value realization</li> <li>Extent of capabilities introduced</li> <li>OCM effectiveness</li> </ul>  | <p>Identify not just the sum of the business value realized but how and where this value is being created in the enterprise. For how, look at the ratio of the value created through IT productivity to the value created through employee experiences and customer issue resolution. For where, look at the value that's being created across departments and/or geographies. Also look at the extent of capabilities introduced and their adherence to your platform vision and roadmap. Your assessment of OCM effectiveness should provide insight into how well your platform vision is understood by key stakeholders.</p>   |
| Business engagement and delivery  | <ul style="list-style-type: none"> <li>Average on-time/on-budget rates for approved demands</li> <li>Quality and defect rates for new releases</li> <li>Developer use</li> <li>Adoption (including adoption of self-service capabilities)</li> </ul>   | <p>In addition to standard release metrics, track the extent of developers building on the Now Platform, both inside and outside of IT. The ability to grow developers—even citizen developers—outside of IT can be a sign of your ability to drive an effective enterprise platform vision. Adoption should also gauge the success of your platform vision as you implement new capabilities, especially outside IT. Measure not just user (both process user and end user) adoption relative to your target, but also measure the average time to adoption, especially as you grow your user base. Taking a long time to reach adoption isn't just a potential signal of poor training and communications, but it could signal that your platform vision does not yet have strong executive- and manager-led championship across the enterprise.</p>   |
| Platform architecture and support | <ul style="list-style-type: none"> <li>Platform performance</li> <li>Adherence to standards and best practices</li> <li>Security</li> <li>Upgradeability</li> <li>Ease of system administration and management</li> <li>User experience</li> <li>Number of integration points with other critical systems</li> </ul> | <p>The metrics for your platform architecture and support team should reflect the fundamentals required for enterprise-level performance. You should also, however, look at the number of integration points with other critical systems to assess the extent to which ServiceNow is becoming central to your overall system architecture.</p>   |
| Innovation                        | <ul style="list-style-type: none"> <li>Adoption (including adoption of self-service capabilities)</li> <li>Number of innovation opportunities identified and/or brought to market</li> <li>Value realized through innovation capture</li> </ul>  | <p>Your innovation team should share adoption metrics with your business engagement and delivery functions. Failure to meet adoption goals within your expected timeline may be due to poor experience design as well as training and communications. As a part of your adoption metrics, pay special attention to the adoption of self-service capabilities, since this is where you're likely to see the greatest improvements and innovations in the employee experience. For more information, see our Success Playbook on <a href="#">improving self-service with ServiceNow</a>. Also measure the value you can generate through innovation. As a baseline, measure the number of opportunities your innovation team and business stakeholders have identified and/or captured. This will signal the extent that your business stakeholders view ServiceNow as a platform for innovation. Second, to help advance your platform vision, measure and communicate the value you've realized from innovations developed on the Now Platform. This should include both financials and stories of best-in-class examples, as they become available.</p> |

Table 4: Recommended CoEI success metrics

## Best practice – Assess your strategic progress toward enterprisewide value

Your strategic governance function should approve the final set of metrics used to assess the success of your CoEI in advancing ServiceNow as an enterprise strategic platform. But more importantly, your strategic governance function should determine whether your CoEI is making progress (and if not, why it isn't) in advancing ServiceNow as an enterprise platform.

Your success in advancing ServiceNow as an enterprise platform can be difficult to measure—in the same way digital transformation can be hard to measure—but you can assess your CoE's enterprise effectiveness with a few simple litmus test questions that your strategic governance function should review as you review your scorecard:

- What's the ratio of the value we're creating inside IT to the value we're creating outside IT?
- How many senior business leaders actively champion ServiceNow? Could any act as an effective executive sponsor beyond the CIO? To what extent is ServiceNow perceived as an enterprise strategic platform?
- How much time are we spending digitizing IT workflows versus digitizing enterprise workflows?
- How effective are we at integrating our activities in a single governance and architecture framework?

### What does “great” look like for your ServiceNow CoEI?

In addition to your performance scorecard, be prepared to communicate to your team, executive sponsor, and business stakeholders what they should expect to see in a high-performing, mature CoEI. You should be able to frame this as a memorable statement that you can repeat consistently to help people anchor their expectations. Use these examples as a starting point:

**Team** – We'll be able to deliver more, at speed, without increasing our workload.

**Executive sponsor** – We'll be able to show a greater number of measurable business wins in digital transformation across business lines and functions.

**Business stakeholders** – We'll have a single point of responsive, innovative delivery against your top demands, and the visibility we need as all of our business demands move from idea to execution.

## What to do next

Once your CoEI is up and running, it should continue to invest heavily in communicating value realization and success stories (particularly related to innovation) that demonstrate ServiceNow's role as an enterprise strategic platform. Make your scorecard central to your strategic governance meetings along with your ServiceNow roadmap.

## The takeaway

A ServiceNow Center of Excellence and Innovation (CoEI) combines competencies for strategy, business engagement and delivery, architecture, support, and innovation in a single organization, removing the seams that can keep you from translating your vision into value realization.

While you need basic prerequisites in place, stand up your CoEI before you go live and before you start to take in (or, worse, get swamped by) business demands for new capabilities.

Standing up your CoEI doesn't necessarily require a large initial headcount. As long as you have expert leadership in place for strategy, business engagement and delivery, architecture, support, and innovation, you can begin to set up "ServiceNow as a Service" offerings to meet enterprise demands and to advance the role of ServiceNow as an enterprise strategic platform.

## What does "good, better, and best" look like for this activity?

**Good** – You've defined a charter and structure for your CoEI that unites ServiceNow activities from strategy to delivery and innovation.

**Better** – You've defined a clear engagement model between your CoEI, process owners and managers, service owners and managers, and business lines.

**Best** – Your CoEI is delivering ServiceNow as a Service to a growing business user base and advancing the role of ServiceNow as an enterprise strategic platform.

## What should I convey to my team?

The role of our CoEI is to "connect the dots" between our strategic vision, our business engagement activity, and our delivery and support activities, so we can accelerate value realization and advance the role of ServiceNow as an enterprise platform for digitizing workflows. Our CoEI will guard against risk and improve our scale and velocity, but even more importantly, it will help the enterprise unlock new opportunities for productivity and experience with digital workflows.



## Appendix

### CoEI role descriptions

#### Strategy

The CoEI strategy team should be led by the ServiceNow platform owner who has overall accountability for the oversight of the Now Platform. This person provides leadership and oversight to other CoEI teams, ensures CoEI alignment to your business objectives and the ServiceNow roadmap, and typically presides over your governance functions. Responsibilities may include:

- Leading the team in alignment with the business strategy, roadmap, and platform governance policies
- Articulating the vision and business value of building, supporting, and developing the platform
- Owning and overseeing ServiceNow instances overall
- Managing and overseeing application escalations
- Actively contributing to ServiceNow governance functions

The platform owner should have skills in enterprise and/or IT service management, IT financial management, and ServiceNow management.

#### Business engagement and delivery

If you have multiple capabilities (like ITSM, HR, and CSM), you should have product owners for each capability who can collaborate with customers to develop the strategy, roadmap, and priorities for their respective capabilities. The product owner (for ITSM, for example) should act as a single point of contact for business line development teams and oversee product backlog management.

Your **business analysts** will work with key project stakeholders to capture business and user requirements. Business analysts will work with development teams to ensure the requirements are understood, developed, tested, and delivered to specification.

Your business analysts should possess sound foundational knowledge of the Now Platform and applications, a detailed understanding of the business users serviced by the Now Platform, and the ability to describe business and user requirements in a manner that enables system administrators, application developers, and quality assurance engineers to understand, estimate the relative effort, and deliver business functionality. Responsibilities may include:

- Representing project stakeholders throughout the planning, development, and release processes
- Owning the relationship with project stakeholders to identify, model, and document business, process, and data requirements
- Working with the platform operations or support team to develop release estimates
- Helping the platform operations or support team understand the business and test requirements
- Translating technical complexities to project stakeholders to make sure they understand the design decisions

In addition to having a strong technical foundation and knowledge of the Now Platform, your business analysts should have strong communications and relationship-building skills and the ability to identify the downstream implications of new requirements.

Your **training and communications specialists** will create material and deliver training that ensures effective and efficient use of ServiceNow applications. They'll work with your platform operations or support team to understand application functionality and create and deliver learning programs in established corporate formats. Responsibilities may include:

- Collaborating with key subject matter experts to assess group and individual training needs
- Planning, developing, and delivering comprehensive learning programs
- Facilitating ongoing communication with project stakeholders to assess the efficacy of the learning programs

In addition to having foundational knowledge of the Now Platform and ServiceNow applications, your specialists should have background in communications and OCM.

The delivery component of your team should include a **ServiceNow development lead, quality assurance (QA) engineer**, and **project manager** or **scrum master**.

Your **development lead** should be a senior technical resource with advanced Now Platform administration skills who can design, build, and customize ServiceNow applications and services. The development lead will work across applications, deliver new functionality, and support the entire development lifecycle. The lead should have a software development background enhanced by training in ServiceNow system administration, scripting, and application creation. Responsibilities may include:

- Assisting ServiceNow system administrators with incident resolution, as needed (L3 support, for example)
- Helping ServiceNow business analysts estimate the release's level of effort
- Designing and developing new ServiceNow applications and services
- Providing mentoring and guidance for ServiceNow system administrators

- Owning and developing complex business requirements

In addition to having advanced system administration skills, your development lead should have background in enterprise or IT service management, experience with database design schemas and data modeling, and requirements gathering.

You should have a **quality assurance engineer** to validate the application functionality developed, configured, or customized by system administrators and application developers—remember that your CoEI will need to establish a strong, centralized testing function to support upgrades and application growth. Your QA engineer should have foundational knowledge of the Now Platform, ServiceNow applications and their use, and ServiceNow's Automated Test Framework and be able to interpret and validate technical specifications. Responsibilities may include:

- Reviewing requirement specifications and technical designs
- Creating comprehensive, well-structured test plans and suites
- Estimating, prioritizing, planning, and coordinating testing activities, including user acceptance testing
- Identifying, documenting, and tracking software defects
- Regression testing resolved defects

In addition to having knowledge of the Now Platform and software QA methodologies, your QA engineer should ideally have foundational knowledge of enterprise and/or IT service management and strong communication skills.

You should also plan for a **project manager** or **scrum master** as you scale development. This person will work with your platform architecture and support team to plan, manage, and deliver ServiceNow releases. They'll track and communicate project status, serve as an escalation point to resolve support team obstacles, and work to deliver project work on schedule and on budget. Responsibilities may include:

- Providing a single point of contact who knows every aspect of the platform support work associated with releases
- Providing direction and oversight to platform support resources for releases
- Planning and defining sprints or project scope
- Establishing sprint or project timelines
- Managing sprint or project risks
- Owning the platform support issues associated with releases
- Owning the communications to release to stakeholders and platform support

In addition to having a sound technical foundation in the Now Platform, this person should have strong project management or Agile planning skills, as well as the ability to develop a consensus between delivery and support resources.

### Platform architecture and support

Your **ServiceNow platform architect** should be a technical leader who provides leadership to the platform operations or support team, ensures the platform aligns with the business strategy, and leads the development of architectural and technical standards and best practices. The platform architect defines and documents standards, analyzes the impact of new requirements, and establishes controls (for example, through your design board) you use the correct technical solutions when you deliver business solutions.

Your platform architect should have advanced technical knowledge of the Now Platform as well as a solid understanding of business strategy and governance practices. Responsibilities may include:

- Creating and maintaining the detailed views of your existing architecture
- Aligning Now Platform capabilities with the business strategy and your ServiceNow roadmap
- Leading the platform operations or support team in implementing technical standards, best practices, policies, and procedures
- Developing architectural controls and impact analysis for new requirements
- Developing your instance strategy
- Identifying reuse opportunities
- Developing the integration strategy between the Now Platform and other enterprise systems
- Providing leadership when implementing new requirements on the Now Platform
- Contributing to and overseeing the governance processes

In addition to advanced knowledge of ServiceNow capabilities and architecture, your platform architect should have experience with enterprise architecture, security, database design schemas and data modeling, requirements gathering, integration, middleware, and discovery technologies.

Your **system administrators** are the backbone of your support team, responsible for maintaining the stability and usability of the Now Platform through application maintenance, managing incident support related to ServiceNow applications, and delivering of configuration tasks and features. Responsibilities may include:

- Managing and resolving incidents related to ServiceNow applications
- Performing routine maintenance, including monitoring performance and identifying and/or remediating errors

- Managing update set creation and migration
- Scheduling and verifying instance clones
- Planning and executing ServiceNow upgrades
- Managing instance security, user/group access or access control lists
- Providing development assistance for ServiceNow releases

System administrators should have advanced skills in ServiceNow system administration, including list/form/navigation pane updates, catalog item development and maintenance, workflow creation and configuration, configuration reviews, instance patch management, and table and field creation. Ideally, system administrators should also have foundational knowledge in enterprise and/or IT service management.

Depending on your business context and policy, you may have separate roles for **security and access administrators**. This role manages access based on data classification to determine the access granted to users and the level of protection to be applied. In the Now Platform, the `security_admin` role is the only role with elevated privileges, and it's automatically assigned to the user who is the default system administrator (admin) user. It provides access to access control lists and high-security settings.

**Data owners** are responsible for determining data classification for data for the Now Platform and applications and decide how the data may be used in alignment with the applied data classification. The data owner reviews classification with your security and privacy functions and communicates data decisions to designated data custodians. Data custodians, who typically reside in business lines with development functions, are responsible for maintaining a safe, secure environment for data retention and protection from unauthorized access, alteration, or destruction, in alignment with data classification policy. They're also responsible for monitoring compliance to ensure the data assigned to them is managed according to their applied classification. These roles may also be assigned to system administrators based on your context.

## Innovation

An **experience architect** should lead this function, one who uses human-centered design thinking to deliver innovative products and services from concept to completion. This architect will lead design efforts that improve and transform the products and services that employees and customers use. Responsibilities may include:

- Partnering with IT teams to identify opportunities to transform experiences for customers and employees with end-to-end digital workflows.
- Developing customer and employee personas and measures to quantify the business impact of having a suboptimal experience

- Auditing existing workflows, developing blueprints for new workflow experiences, and identifying opportunities for improvement and experimentation
- Assisting IT leaders in working with cross-functional partners to define customer journeys and digital workflow needs
- Designing new touchpoints to evolve in-person and digital experiences.
- Translating aspects and components of the workflow experience to new channels and contexts
- Creating seamlessly integrated service experiences with other enterprise digital platforms

Ideally, this role should coach or nudge business lines toward self-service—in adoption, opportunity spotting, and developing new capabilities on the Now Platform. (For more on self-service, see our Success Playbook on [improving self-service with ServiceNow](#)).

In addition to having expertise in human-centered design and experience strategy, your experience architect should have (or build) knowledge in advanced ServiceNow capabilities (like Virtual Agent) to bring experience architecture designs to these capabilities. The experience architect should also have strong collaboration skills to ensure they can work at various levels, from individual employee interactions to executive-level overviews of end-to-end employee and customer journeys.

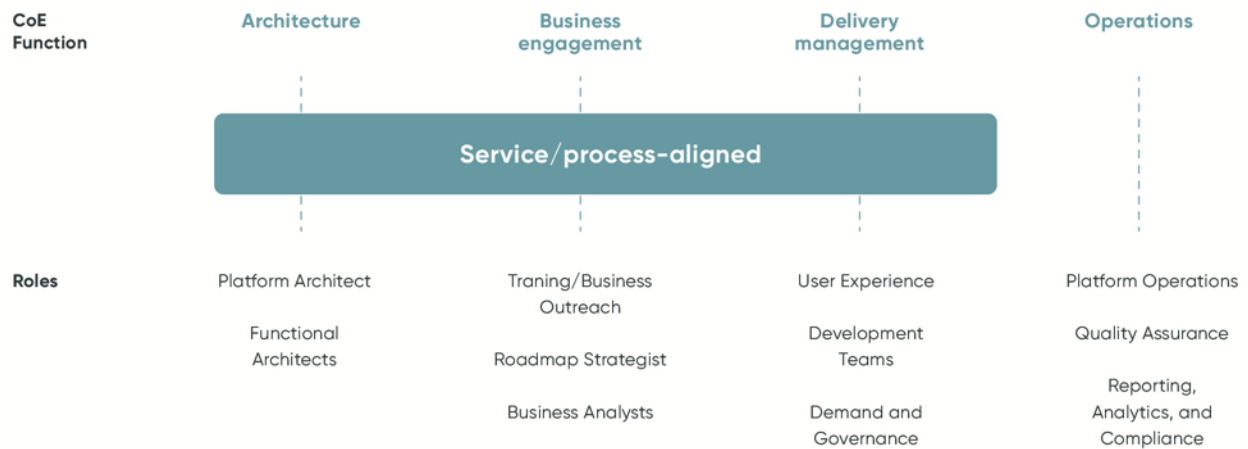
## Example CoEI organizational charts

Here are some samples of different organizational models for a ServiceNow Center of Excellence and Innovation.

**Aligned with support global deployment** – In this model, “delivery” primarily supports ServiceNow implementation, while “operations” supports OCM, training, and business engagement. Roles for each function are not defined in this model. Note that this model calls out a distinct function for strategy, as recommended by ServiceNow.

| CoE Function | Strategy & program management  | Architecture & governance   | Delivery   | Operations  |
|--------------|--|---|--|---|
| Activities   | <ul style="list-style-type: none"> <li>• Select Now Platform capabilities for global deployment</li> <li>• Manage the enterprise roadmap for ServiceNow</li> <li>• Track ServiceNow usage and value created</li> </ul> | <ul style="list-style-type: none"> <li>• Enterprise-level ServiceNow instance strategy</li> <li>• Data management and residency</li> <li>• Avoid or address technical debt</li> <li>• Consolidate redundant initiatives or solutions</li> </ul> | <ul style="list-style-type: none"> <li>• Implementation methodology and guidelines</li> <li>• Allocate resources to the implementation</li> <li>• Oversee the implementation process and track progress</li> </ul> | <ul style="list-style-type: none"> <li>• Manage organizational change</li> <li>• Provide ServiceNow training</li> <li>• Manage communications with ServiceNow globally</li> </ul> |

**Aligned with support enterprise service management** – In this model, architecture, business engagement, and delivery are aligned with support service or process owners. For example, the delivery management function supports implementing and configuring specific services and processes on ServiceNow and ensures consistency across them. Note that business engagement owns the development of the ServiceNow roadmap.



**Aligned with support business units** – In this model, architecture and development have leads/teams dedicated to specific business units. This may be a good fit for organizations with more decentralized business structures supported by multiple instances. Note that in this model, business analysts are embedded in the delivery rather than the business engagement function, as development teams are aligned with specific business units.

| CoE Function | Instance architecture                                     | Business engagement                         | Delivery and development management   | Operations   |
|--------------|---|---|---|--|
|              |   |   |   |  |
| Roles        | Platform Architects aligned by business line and instance | Training/Business Outreach<br>Documentation | User Experience<br>Business Analysts<br>Demand and Governamce<br>Development Leads and Teams (by business line) | Integration<br>Testing and Platform Support<br>Reporting Analytics, and Compliance |

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](mailto:best.practices@servicenow.com).