

Engage your executive sponsor to drive change and remove roadblocks

What's in this Success Playbook

This Success Playbook provides effective methods to expand ServiceNow® and the specific actions you should follow to effectively identify and engage with an executive sponsor, including how to:

- Make sure your executive sponsor has the right level of authority and influence to be an effective advocate
- Define the role and responsibilities of a ServiceNow executive sponsor
- Develop an action plan, and make the plan your framework for ongoing collaboration and engagement with your executive sponsor
- Prepare your executive sponsor with a clear story that supports ServiceNow expansion discussions at an executive level

The most important things to know

Engagement depends on preparation, so make sure your executive sponsors are clear on their role and responsibilities. Arm your executive sponsor with the right education, action plan, and supporting resources to be an effective advocate for your ServiceNow implementation.

The payoff of getting this right

The right executive sponsor helps you make sure the decisions you make regarding your ServiceNow implementation align with your business vision and support desired outcomes. In addition, you'll decrease implementation time since your executive sponsor can establish consensus faster and make quick decisions.

What you need to get started

Prerequisites

You need to understand how much time the executive sponsor will commit to ServiceNow per week or month and how much information the sponsor will need to make effective decisions.

When you should start this activity

Identify your executive sponsor at least two months before your implementation project begins, so you can begin familiarizing them with the implementation plan and calendar. If implementation has already begun (or if you have a new executive sponsor), familiarize your sponsor right away with your vision, objectives, and roadmap for ServiceNow.

Playbook overview

ServiceNow recommends completing the four steps listed in this table to engage your executive sponsor effectively.



If you don't have a named executive sponsor, we recommend starting with Step 1.

If you currently have an executive sponsor in place, you may want to start with Steps 2 and 3 to improve your sponsor's effectiveness.

Step 1 – Define the role and responsibilities of the executive sponsor

KEY INSIGHTS

- Ensure your executive sponsor has the right level of authority and influence to be an effective advocate.
- Invest in early communication and education, especially on your strategic objectives and roadmap. Have the executive sponsor consider the organizational change required.
- For effective engagement, learn about your executive sponsor's personal leadership style.

To make sure you have a leader who can help effectively communicate your team's vision for transformation, remove organizational obstacles, and help get access to resources, define your executive sponsor's responsibilities explicitly. Organizations that treat the executive sponsor role as a formality—that is, as “someone who signs the checks”—can struggle later when they need senior-level engagement to resolve implementation challenges and other roadblocks.

To define an effective role for the executive sponsor, take these four action steps:

1. **Define the responsibilities necessary to oversee the ServiceNow strategic roadmap.**

The most important role that an executive sponsor can take is to ensure that decisions regarding ServiceNow implementation align to a clear business vision and outcomes. Create a [job description](#) for the sponsor role that explicitly lays out what they'll need to do to make sure you have this alignment.

2. **Determine the candidate roles that may take on the position of executive sponsor.**

Identify candidates who have the right level of authority and influence in your organization so your sponsor can effectively execute his or her responsibilities. In many cases, this is as important, or more, than the sponsor's experience with system implementation.

3. **Define what “good” looks like.**

Emphasize that your executive sponsor will take an active role in setting the strategy. To do this, define how the role can (and should) accelerate opportunities for business value creation while benefiting the sponsor's own career.

4. **Schedule a cadence of meetings with your executive sponsor.**

Finally, take the lead in defining a cadence of engagement based on your executive sponsor's needs for ongoing education and your need to align ServiceNow implementation and management with the organization's financial planning and IT portfolio planning cycles.

Customer insights

Our customers have identified three insights that help establish the executive sponsor role.

INSIGHT 1:

Select for authority and influence first, experience second

Because of competing demands, some organizations may be tempted to delegate the executive sponsor role or assign it to individuals with previous experience in system implementation. While this may appear logical, it overlooks the two most critical roles that an executive sponsor can play: removing organizational roadblocks to implementation and leading change across organizational silos. Your executive sponsor doesn't need experience as much as they need:

- The authority to remove roadblocks
- Enough influence to lead and champion change

Best practice – Evaluate the informal and formal influence of your executive sponsor candidates

To the extent that you have the scope to select or recommend an executive sponsor, evaluate the formal and informal authority and influence your candidates have in your organization. Ask yourself:

- Which of my potential sponsor candidates has been most successful at leading change, especially in areas where they have no formal authority?
- What authority do my potential sponsor candidates have to allocate (or reallocate) resources if we encounter implementation challenges?
- Do my potential sponsor candidates have a strong leadership profile across organizational silos? Do they have a track record of influencing the direction of cross-functional initiatives?

INSIGHT 2:

Invest heavily in communication and education, especially in strategy

You may have an executive sponsor in a senior, even C-level position, or with deep experience in system implementations. However, don't assume that your sponsor knows what they need to do to steer the vision and strategy for ServiceNow.

Many organizations with experienced sponsors jump right to the tactical decisions and actions associated with implementation without spending enough time on developing the sponsor's vision for business value and transformation. Without this perspective, you could have trouble working with your sponsor on the tactical decisions and responsibilities that drive the ServiceNow roadmap.

Instead, discuss any upcoming organizational changes with your sponsor. Embrace change and be prepared to challenge the way you work today.

Best practice – Learn your sponsor's perspective on the vision for ServiceNow

Before you start defining engagement at a tactical level, work with your executive sponsor to understand their perspective on the vision and business case for ServiceNow at your organization and on how it relates to their personal business goals. Ask:

- What business outcomes are most essential to the success of your function?

- What business objectives from the C suite can ServiceNow affect?
- How should we best position ServiceNow as a strategic solution for the organization?
- What red flags would signal that your business outcomes are at risk?
- How will you make sure that your executive sponsor engagement doesn't derail due to competing ideas and demands?

INSIGHT 3:

Understand your sponsor's personal leadership style

Not all executive sponsors are made the same, but all executive sponsors can be effective in their own way. Your engagement approach needs to account for the sponsor's personal preferences in terms of how they consume information, communicate, and make decisions. Without this, you're more likely to risk deteriorating engagement over time.

Best practice – Discover your sponsor's engagement preferences

As you begin to define your cadence for engagement, ask both your executive sponsor and their direct reports about the sponsor's engagement preferences. Make sure you understand:

- **Your sponsor's leadership approach, particularly on decision-making** – Is your sponsor focused on the big picture or more detail oriented? Does your sponsor prize consensus, or are they more likely to take positions independently? This will help you both frame decisions as well as identify decisions that the sponsor is likely to delegate.
- **Your sponsor's communication preferences** – Learn how much information your sponsor prefers to receive and their preferred channel for communications—face-to-face, email, or some other form.
 - Don't substitute other channels for regular face-to-face communications, but knowing your sponsor's preferences will help you decide whether your meetings should be, for example, more frequent and informal versus less frequent and formal.
- **Your sponsor's workload and the cadence of their business function** – At a minimum, learn where your sponsor's attention and capacity is likely to be taken up with other demands, so you can plan your most important points of engagement at alternative times.

What to do next

Having laid the foundation for the executive sponsor role, you'll be well prepared to organize your executive sponsor for success with a clear action plan. Also, be prepared to revisit how you've defined your sponsor's responsibilities, especially when:

- Your executive sponsor changes
- Your vision and business objectives change or you expand ServiceNow capabilities

Have a candid conversation with your sponsor at least once a year about their perceived effectiveness in the role so you can determine how you should redefine their activities and your engagement model.

Step 2 – Prepare the executive sponsor

KEY INSIGHT

- Provide information that helps the executive sponsor connect ServiceNow products to use cases for digital transformation.

To be effective, your executive sponsor needs to be adequately prepared. Preparation should include education about ServiceNow, the sponsor's role in strategic decision-making and governance of the ServiceNow roadmap, and an understanding of how you'll realize business outcomes with ServiceNow. Your executive sponsor needs both the big picture and a tactical understanding of your implementation to address C-suite questions, manage challenges, and make effective decisions.

To prepare your executive sponsor, take these three action steps:

1. Review the role and responsibilities of a ServiceNow executive sponsor.

Ensure that your executive sponsor is aligned with your definition of their responsibilities and the types of decisions that need to be made.

2. Define preparation needs for an executive sponsor.

Put together a training plan that includes the things the executive sponsor must know to be successful and to meet the team's needs. Lay out the objectives of each training phase so the executive sponsor is clear on what they should learn.

3. Give the executive sponsor important information about the project.

Your executive sponsor needs to understand the basics of the ServiceNow products being implemented, the partners being used, and the business units involved, as well as any risks and roadblocks to implementation. Also, make sure to communicate the role and responsibilities of the executive sponsor to your platform team and, if you're in a large organization, the governance workgroups they'll be involved with and the expectations from each group. This way, your teams will understand the support role the executive sponsor provides, including escalation paths, and they can avoid conflicts or confusion.

Customer insight

ServiceNow customers recommend these ways to prepare your executive sponsors.

INSIGHT

Make the executive sponsor a product champion

Once your executive sponsor is in place, begin to build their product knowledge. Consider asking your ServiceNow account team for input and support. Your executive sponsor may need an executive from ServiceNow to act as a sounding board regarding program plans. This individual may be a ServiceNow executive or a program advisor from our Customer Outcomes team.

In addition to your account team, take advantage of resources like the [ServiceNow Foundations e-learning course](#). Review this content to see if it aligns with your current implementation needs and share it with your executive sponsor.

Most importantly, draw a clear line for your executive sponsor between product knowledge and the business outcomes they care about. Inundating your executive sponsor with irrelevant information is nearly as bad as failing to provide any information at all.

Best Practice – Provide product knowledge that connects to digital transformation use cases

The product knowledge you provide should connect product information to information on digital transformation use cases. Ideally, those use cases will be from your industry.

One way to get this information is to attend the annual ServiceNow [Knowledge conference](#) where we share product information and use cases with attendees. In addition to our Knowledge conference, we have ServiceNow User Groups ([SNUGs](#)) that review specific products. SNUGs are smaller events that focus on the product(s) you use.

Remember, your executive sponsor will be more interested in ServiceNow when they know how it relates to the business outcomes they care about. You should:

- **Provide a baseline education on ServiceNow capabilities and use cases** – This gives your executive sponsor the context they'll need to effectively evangelize the value ServiceNow can bring to your organization. That value becomes more transparent when the sponsor better understands the use cases for ServiceNow capabilities.
- **Provide a combination of ServiceNow resources, industry-related articles, and case studies for the executive sponsor to review** – Ideally, these should focus on how peers have realized comparable business outcomes with ServiceNow.

What to do next

Now that you've prepared a training program for your executive sponsor, prepare them for success with a clear *action plan*. Also be prepared to revisit or repackage some of the training you provided should your executive sponsor need more information.

Ask your executive sponsor for feedback about the training and resources you provide. Ask if they feel prepared to be a leader for your ServiceNow program. If certain elements did not meet the sponsor's objectives, consider alternatives, including repackaging information in a more consumable format.

At each upgrade, revisit your training to update your executive sponsor about changes in ServiceNow functionality. You can also use these opportunities to see what industry content or best practices ServiceNow and its partners have created.

Step 3 – Create an action plan for your executive sponsor

KEY INSIGHTS

- Action planning is what matters most—make the plan your framework for ongoing collaboration and engagement with your executive sponsor.
- To make the best use of your sponsor's limited time and capacity, focus on what the sponsor needs to know and do in order to streamline decision-making.

Preparation doesn't end with training. Next, inform and prepare your executive sponsor for the key decisions they'll need to make, particularly with respect to your ServiceNow roadmap and budget.

Let your sponsor know what their time commitment is, including:

- **Which meetings require their involvement** – These might be strategic governance meetings and quarterly business reviews of partner performance.
- **Day-to-day actions they need to perform to make implementation progress** – These include the actions required to remove one-time roadblocks, approve customizations, or deal with escalations.
- **Preparation time to evangelize ServiceNow with their peers and across the organization** – The executive sponsor should promote implementation progress and adoption and reaffirm the business objectives.

Take these two action steps to create your sponsor's action plan:

1. Create an action plan with your executive sponsor.

Focus on what they'll need to do to support the ServiceNow project. The action plan should be explicit about the:

- **Action to be taken or decision to be made** – For example, "We need to craft a transformation vision statement."
- **Objective of the action item or decision** – This will provide a shared understanding of the organization's vision and required changes.
- **Tactics to be used to develop the action** – For example, "First, we'll learn about industry and market trends."
- **Expected next steps or outcomes** – For example, "Next, we'll identify capabilities that are necessary to realize the vision."
- **Expected timeline(s) for completion**

2. Identify the things the executive sponsor may have to do that aren't in a plan but are part of their day-to-day responsibilities.

There are executive sponsor activities that fall outside of the plan and are difficult to anticipate. This includes addressing project risks, intervening with partners to address performance or relationship issues, or dealing with point-in-time escalations. Also, get clarity

from the executive sponsor on the specific issues that they'll expect to be escalated and want to be involved in.

Customer insights

ServiceNow customers recommend the following best practices to develop an effective action plan with your executive sponsor.

INSIGHT 1:

Make the action plan a framework for collaboration and engagement

The point of a good action plan is to provide a framework you can use to collaborate regularly with your executive sponsor and keep them engaged in implementing and managing ServiceNow. Don't think of this as a deliverable so much as a living plan that keeps critical decisions, issues, and actions at the forefront of your sponsor's attention.

Best practice – Review and update the action plan in every scheduled meeting you have with your executive sponsor

Collaborate with your executive sponsor to create and update the action plan. The action plan will change based on your understanding of the sponsor's capacity and leadership style and as the sponsor learns your needs for effective ServiceNow implementation and management.

The action plan should establish the agenda for every meeting you have with your sponsor so you can iterate on line items. It should be comprehensive but doesn't need to be complex. See Table 1 for an example template.

Executive sponsor action plan

Creation date:

Revision date:

Action item	Objective	Key tactics	Outcomes and next steps	Deadline to complete	Status
Craft the transformation vision statement with senior leadership.	Provide a shared understanding of where the organization is going and what changes are required to get there.	<ul style="list-style-type: none"> Learn about industry and market trends. Contribute to the visioning exercise. 	Identify the capabilities that are necessary to realize the vision.	4/30/2019	In progress
Review the ServiceNow product roadmap with the platform team.	Ensure your roadmap phases are aligned to business priorities.	<ul style="list-style-type: none"> Review the business case priorities. Ensure your sponsor is familiar with ServiceNow products. 	Identify the KPIs for monitoring your progress against the roadmap.		
Establish a strategic governance steering committee.*	Establish oversight of your ServiceNow roadmap and value realization.	<ul style="list-style-type: none"> Identify the needed participants. Define the decision-making process. 	Set cadence and agenda for committee meetings.		

Table 1: Executive sponsor action plan

EXPERT TIP

Defining the role of your strategic governance group is critical. Answer these questions:

- What's their charter?
- What's their decision-making scope?
- Do they oversee service management operations and strategy or just the ServiceNow program and roadmap?

For more guidance, see our Success Playbook on [building a dedicated, dynamic governance process, policies, and team](#).

INSIGHT 2:

Make the best use of limited sponsor time and capacity

The executive sponsor role is rarely, if ever, full time, so you need to respect their time and competing priorities. You'll need to be particularly careful to ensure that the sponsor has enough information at the right level of detail to make decisions and understand their implications.

Best practice – Be realistic about your sponsor's capacity in your action plan

When you create an action plan for your executive sponsor, be realistic about their time and capacity. Your plan should focus on high-value action items—like overseeing the strategic roadmap—that make the best use of their time.

During your meetings with the executive sponsor, get a sense of the time, capacity, and their preferred approach (detail oriented or big picture) that will help you craft the plan more effectively. Also, meet with the executive sponsor's executive assistant and direct reports to develop insight into the sponsor's communication style and preferences.

Best practice – Include info in the action plan that fosters fast decision-making

Supplement your action plan with information that will help your sponsor to get up to speed quickly on a decision or activity. As an example, let's assume that your sponsor needs to approve a decision on whether to upgrade your ServiceNow implementation.

To prepare your sponsor, prepare an executive-level summary that they can, ideally, read in 15 minutes or less that includes what the upgrade will provide, the time and resources required, and the potential value the upgrade will have for your organization (along with your recommendation). Remember that your sponsor's primary job is to communicate, so ensure your materials support that.

Continue to seek feedback on the right level of material needed by your executive sponsor to make decisions or support activities in your action plan.

Best Practice – Create guiding principles with your executive sponsor

Work with your executive sponsor to create ServiceNow guiding principles. The sponsor will own these principles and communicate them to team members as operating principles or "golden rules." These operating principles will further respect your executive sponsor's time and may answer design or data questions without the sponsor's input. See Table 2 for some examples of guiding principles.

Project design	Data	Program longevity
<ul style="list-style-type: none"> • We design and build ServiceNow using out-of-the-box functionality, choosing configuration over customization every time. • We change the process to suit the best use of the platform—we don't change the platform to suit processes. • We design with a common user interface and a mobile-friendly strategy. • The product owner has the ultimate authority over decision-making, that is, they'll make decisions based on business and/or regulatory requirements without influence. • The product owner has the delegated authority of the CIO. 	<ul style="list-style-type: none"> • ServiceNow will become the single system of record for all ITSM processes. • Only data from trusted sources is fed into ServiceNow, and data is not manually manipulated after import. • Data is manipulated, if necessary, at its source. 	<ul style="list-style-type: none"> • The design structure is supported from the CIO down. • Future development and releases will be based on formalized demand management through ServiceNow. • Our company will always be on the latest build within two months of release, based on automated testing and rapid deployment. • We will build and maintain a release management strategy.

Table 2: Examples of guiding principles developed by an executive sponsor

Expert tip

The executive sponsor has an important role in developing these guiding principles. Be careful with how restrictive the guiding principles are—stakeholders with little ability to guide the ServiceNow program may be less supportive.

What to do next

Your action plan should establish an effective cadence and collaboration with your executive sponsor to address the key decisions and activities that support ServiceNow. Be prepared to revisit your action plan at each point of engagement with your executive sponsor to address changing business needs. If your executive sponsor changes, introduce your new sponsor to your current action plan and ask for feedback to adapt it to their needs and preferences.

As your sponsor becomes more comfortable in their role—and deepens their knowledge of ServiceNow—you'll be ready to work with them to expand ServiceNow use cases and adoption across the enterprise.

Step 4 – Use your executive sponsor to optimize and expand ServiceNow adoption

KEY INSIGHTS

- Arm your executive sponsor with a clear story to support expansion discussions at an executive level.

After your initial implementation, begin to identify opportunities and potential use cases for expanding ServiceNow across your organization. Proactively look for business units where processes are not working well or are just very slow. Have your sponsor share their valuable ServiceNow story with this group.

What other groups or business units would benefit from ServiceNow capabilities? Your executive sponsor, assuming they lead your strategic governance function, should review these opportunities as part of the ongoing reviews of your ServiceNow roadmap.

Your executive sponsor isn't necessarily best positioned to identify potential use cases but is best positioned to identify the most important business objectives held by peer executives. With a clear understanding of these objectives, you can begin to target your search for expansion use cases with the support and championship of your executive sponsor.

To be successful at this stage, take two critical action steps:

- 1. Identify key stakeholders in other business areas/units that your executive sponsor can engage with.**

Focus your discussions with your executive sponsor on identifying the business objectives key stakeholders have that can be addressed through ServiceNow. This can be a collaborative process, especially as you uncover potential use cases at a business-line level.

- 2. Give the executive sponsor methods to effectively evangelize the value of the Now Platform®.**

Arm your executive sponsor with appropriate data and messaging to demonstrate how ServiceNow has delivered value for your organization to date—and how you can extend this value.

Customer insights

INSIGHT 1:

Arm the executive sponsor with a story to support expansion discussions

Without the right tools and talking points, your executive sponsor will have difficulty influencing other decision-makers and evangelizing the potential value of ServiceNow. Prepare your executive sponsor to explain digital transformation and enterprise service management to peers, along with its potential for accelerating your organization's business strategy.

Best practice – Provide your sponsor with a story

Provide the executive sponsor with a clear story that includes industry data, peer anecdotes, and demo materials that connect your organization's vision for transformation to use cases for new pilots and expansion. Collect and arm the sponsor with material that:

- Uses industry case studies to define digital transformation
- Demonstrates ServiceNow capabilities
- Ties transformation to clear business benefits, using tools like the [ServiceNow Value Calculator](#)
- Suggests use cases for a pilot, such as employee onboarding for HR

Check out our Success Playbook on [building organizational support for enterprise services transformation](#) to learn more about accelerating enterprise service adoption.

What to do next

Expanded use of ServiceNow may, over time, involve multiple executive sponsors. Use your executive sponsor to help identify new executive sponsor candidates and build effective engagement with them.

The takeaway

Your executive sponsor is responsible for ensuring that your ServiceNow implementation and management aligns to business goals and realizes value. To garner support from the executive sponsor and to prepare them for this journey:

- Define the executive sponsor's responsibilities so it's clear what's required of the role.
- Set up a cadence of meetings with the executive sponsor to keep them informed and work through any challenges.
- Train the executive sponsor to understand the capabilities of the Now Platform and steer the ServiceNow roadmap.
- Create an action plan that informs what actions the executive sponsor should take and what decisions they need to make.

The most successful customers arm the executive sponsor to expand the use of ServiceNow to other business units by evangelizing success stories, developing strong business cases, and roadmaps, and securing additional executive sponsors.

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

Good – Your executive sponsor understands the responsibilities associated with the role and is actively engaged.

Better – The executive sponsor influences the direction of your roadmap and removes roadblocks to implementation.

Best – Your executive sponsor is a strong advocate for your ServiceNow implementation and educates business leaders on the value of enterprise service management.

What should I convey to my team?

An engaged executive sponsor can help us remove roadblocks and accelerate our efforts. Take every opportunity to arm them with the right, need-to-know information to advocate for our ServiceNow program.

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

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

Appendix

Key performance indicators (KPIs)

To determine if you're performing the steps and recommendations in this Success Playbook effectively, measure these KPIs:

- *# of internal ServiceNow platform team and steering committees attended by the executive sponsor* – Meeting attendance is the best indicator of your sponsor's engagement and mindshare investment in ServiceNow. Track attendance at all meetings, including one-on-one meetings, to identify any trends that point to a lack of engagement.
- *# of escalations handled by the executive sponsor* – The number of escalations the executive sponsor handled related to the ServiceNow implementation reflect his or her support in removing roadblocks. Escalations that are passed on to other functions or leaders may be a sign of ineffectiveness.
- *# of implementations (on time and on budget) completed on time versus per plan* – The number of ServiceNow product implementations completed on time and on budget can help validate your sponsor's effectiveness.

Stakeholder management

Use this table to identify which stakeholders need to be held responsible/accountable and the stakeholders that need to keep consulted/informed.

Responsible accountable stakeholders	Consulted/informed stakeholders
<ul style="list-style-type: none"> Now Platform Owner Executive sponsor ServiceNow governance team lead ServiceNow OCM program team CIO CFO Senior leadership 	<ul style="list-style-type: none"> Business leaders Business partners Partners ServiceNow users (inform only)
<p>KEY COMMUNICATIONS</p> <ul style="list-style-type: none"> Communicate the roles, responsibilities, and decision-making authorities of the executive sponsor. If feasible, share the executive sponsor's action plan. 	<p>KEY COMMUNICATIONS</p> <ul style="list-style-type: none"> Communicate the executive sponsor's role, responsibilities, and decision-making authorities.

Related resources

- [Success Checklist – Engage your executive sponsor to drive change and remove roadblocks](#)
- [ServiceNow Value Calculator](#)
- [Success Quick Answer – Understanding the ServiceNow executive sponsor role](#)