

Build a dedicated, dynamic governance process, policies, and team

What's in this Success Playbook

This Success Playbook will teach you how to establish governance so you can be certain that the way you're using ServiceNow® achieves your business objectives. You'll learn to:

- Assign the people who need to be involved and responsible for setting up ServiceNow governance authorities, processes, activities, and policies
- Define how key decisions are made with respect to how you define—and adhere to—your ServiceNow roadmap, your platform management and stability, and how you manage your portfolio of ServiceNow capabilities
- Plan to continually improve your ServiceNow governance over time

Key takeaways

The most important things to know

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

The problem is that many organizations under invest in getting governance right. So you don't limit what you can achieve with ServiceNow:

- Take the time to involve the right people in governance decisions.
- Define value-adding process and policies so you have the direction and guidelines you need to get work done.

The payoff of getting this right

Governance provides the foundational guidelines and operating structure you need to:

- Maintain the integrity of your ServiceNow implementation
- Expand the value you can deliver using ServiceNow
- Support business objectives and transformation in how work gets done at your organization

- Delegate development and administration across multiple parts of the organization and its partners, which helps you evolve faster and see more value

What you need to get started

Leadership support

Find leaders who will help you establish ServiceNow governance.

Enlist someone to lead in defining the scope, direction, and goals for your governance program, designing a plan or roadmap for how you'll set up ServiceNow governance, and identifying who will need to be involved in the setup process.

Prerequisites

Develop an understanding of why your organization needs ServiceNow governance and what you hope to achieve with it.

Stakeholders

Create a list of the people and groups that should be involved in building and managing ServiceNow governance.

When you should start this activity

Start considering governance requirements when you build your business case for ServiceNow. Develop your governance plan in parallel with your ServiceNow roadmap and implementation plan to make sure you can support your vision and roadmap and that the end-state governance framework can be in place to guide work on the platform as it's delivered.

Playbook overview

To establish good governance, follow these steps.



Step 1 – Prepare to set up ServiceNow governance

KEY INSIGHTS

- Involve people who are adept in both technology and business when you set up your governance program.
- Create a stakeholder map that shows who needs to be involved in setting up ServiceNow governance and what they can contribute.

Your governance program will define how your organization will make—and capture in policy—the decisions that will guide your ServiceNow implementation. But getting this right requires careful program planning and design from the start.

Determine upfront both:

- **What level of governance you need** – This protects you against risk and allows you to respond to business needs.
- **How you intend to actually put this governance in place** – The governance program you ultimately design also needs to fit within any existing governance frameworks your organization has established as well as within your decision-making culture.

To determine who will be involved in establishing ServiceNow governance at your organization, complete these action steps:

1. **Assign your Now Platform owner to designing your governance program and coordinating its setup.**

Most organizations should start by asking their platform owner to spend part of their time establishing governance for your ServiceNow implementation. The platform owner is best positioned to lead in defining the scope, direction, and goals for your governance program, designing a plan or roadmap for how you'll set up ServiceNow governance, and identifying who will need to be involved in the setup process. If the platform owner needs additional help, they should first recruit a program manager to support planning and coordination and then involve others only as needed.

2. **Identify the key stakeholders who need to be consulted and informed when you establish governance for ServiceNow.**

Early in the process, your platform owner must identify what other roles and groups will be involved in establishing ServiceNow governance and how they'll contribute. This stakeholder analysis often reveals both who you will need to work with directly in order to set up governance and who will need to be involved in ServiceNow governance functions once they're established.

Customer insights

At ServiceNow, we've spoken to many customers about setting up governance for the first time. Our customers have identified two essentials for ensuring that the design and setup of your governance program prepares you to define the specific governance authorities, processes, and policies you need to deliver value with ServiceNow.

INSIGHT 1:

Involve people with both technical and business skills when you set up your governance program

All too often, organizations think of governance in terms of controlling what happens on the technology—and then they design a governance program that focuses on *technical* standards and management. The consequence is that the responsibility for setting up governance often defaults to the staff with technical skills.

But if your organization is looking for transformation, the most important governance decisions to frame *aren't* technical—they're about the strategic direction of the ServiceNow roadmap and how technical decisions align and support that. The people who design and set up your governance program need to balance an understanding of business as well as technical needs.

Best practice – Make sure the people tasked with setting up governance understand the nontechnical elements of ServiceNow governance

Your Now Platform owner usually has both the technical and strategic perspectives required to set up an effective governance program that goes beyond basic platform management. Involve other people with experience in strategic planning and who understand the business challenges as needed, if the platform owner in your organization is primarily technically focused. Platform architects and business analysts, for example, usually have the experience and know-how to provide this business perspective.

Best practice – Involve enterprise architecture in establishing ServiceNow governance

ServiceNow is becoming increasingly central to supporting many organizations' strategic objectives—like driving digital transformation, enabling enterprise service management, etc. Establish governance with those objectives in mind so the governance helps your organization realize strategic goals faster and more consistently.

To get that right, work with architects on the enterprise architecture (EA) team who can help you better understand the overall business and services architecture that ServiceNow supports at your organization. Leaning on their experience and perspective can dramatically expedite your progress.

This internal consult can also help your platform owner design a ServiceNow governance model without needing to recruit many others to support them. It's also good to engage with EA on ServiceNow governance early because they're probably important stakeholders that you'll want to engage in governance decision-making groups later on.

INSIGHT 2:

Build a stakeholder map that shows who needs to be involved in setting up ServiceNow governance and what they can contribute

Your platform owner (and any others working to set up ServiceNow governance) needs to coordinate with other groups to make sure that your ServiceNow governance program fits within the context of existing enterprise governance and policies. Unfortunately, many groups overlook this need because they don't have a strong sense of whom to involve and how to work with them. To avoid this, brainstorm a list of stakeholders that might need to be involved when you initially set up ServiceNow governance.

Map these different stakeholder groups—such as your executive sponsor, the PMO, and process owners—and define what you think each stakeholder can help contribute to your governance program. The map will be different at every organization but will generally involve at least the groups and tasks included in Figure 1.

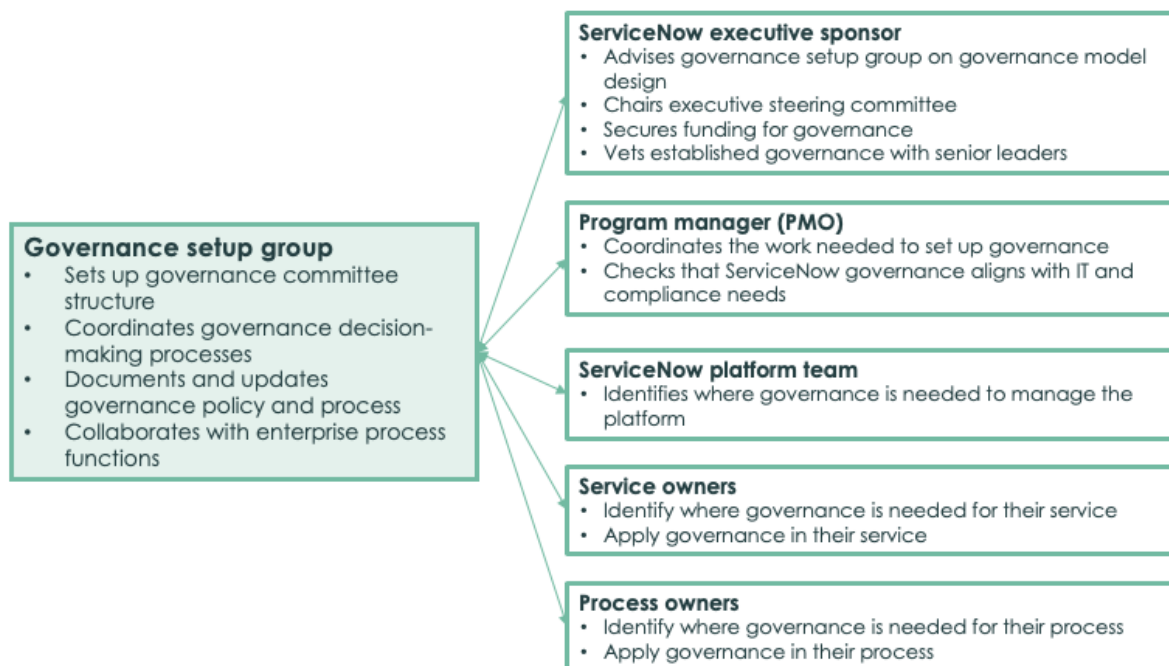


Figure 1: Stakeholders and responsibilities involved in setting up ServiceNow governance

You might start with only one person (the platform owner, perhaps) if you only need to work with a few different stakeholders or teams as you initially set up your governance authorities, processes, and teams. If your stakeholder analysis points to a lot of coordination needs across stakeholders to set up governance, you may want to enlist additional resources.

What to do next

After you establish a group to lead and coordinate establishing your governance program and identify the stakeholders who should be involved, your next step is to engage these groups in developing clear governance authorities, processes, and policies.

Be prepared to revisit your plan for establishing governance periodically as you move forward, especially when:

- Your executive sponsor changes
- Your vision and business objectives change, or you expand ServiceNow capabilities
- Your organization's risk profile changes
- Your organization isn't on track to realize its objectives with ServiceNow

Step 2 – Define governance authorities, a process, and policies for strategy, technical, and portfolio governance

KEY INSIGHTS

- Don't just focus on decision-making bodies—also define how decisions get made.
- Get to know your organizational context before you define policies.
- Start with a minimum viable set of governance policies.

With a small group in place to plan and coordinate setting up governance, it's time for this group to coordinate establishing the authorities, activities, and processes you need to structure how your governance decisions are made and how policies are formed.

These three things are your foundation for establishing and refining the policies that govern how work is done with ServiceNow. Without this in place, it's all too easy to define policies erratically and ad hoc, only responding to in-the-moment needs rather than taking a strategic look at how policy can help accomplish your ServiceNow vision.

Our Success Checklist on [establishing a dedicated, dynamic governance process, policies, and teams](#) describes how to define governance authorities, processes, and policies across three different categories of governance, which we classify as:

- **Strategy governance** – Defines how strategy roadmap decisions are made to align ServiceNow functionality to business outcomes
- **Technical governance** – Governs the management and stability of the ServiceNow support model
- **Portfolio governance** – Articulates how decisions about your portfolio of ServiceNow capabilities are made and captured in policy

These types of governance are established in much the same way, by completing these action steps:

1. Define governance decision-making authorities and processes.

One of the most important steps in establishing governance is to define who needs to be directly involved in decision-making processes that determine how your organization will use and govern ServiceNow. Take great care both when you define how decisions will be made and when you identify who should or must participate in these decisions.

2. Define governance activities that establish how decisions are made and captured in policy.

Invest in designing a set of activities to inform governance decisions and to record those decisions into a policy that the organization can use to guide the management of your ServiceNow implementation. These activities—setting agendas for governance boards, providing relevant information to decision makers, and articulating policies—are critical because they allow governance authorities to focus on the right priorities, provide the

information they need to make good decisions, and create a process for capturing decisions and writing them into policies that your organization can consistently use to guide work.

3. Define initial governance policies.

The end product of good governance is a minimally sufficient set of policies that inform and govern how work is best done with ServiceNow to drive business value. Your initial set of policies will set a precedent—you record the decisions made by your governance authorities so they can be followed across your entire organization.

Customer insights

ServiceNow customers have identified three insights that are critical as you define governance authorities, processes, and policies.

INSIGHT 1:

Don't just focus on decision-making bodies—also define how decisions get made

The most common approach to establishing governance authorities is to set up a governance board (or multiple boards) that convene to:

1. Address any questions that have escalated to the leadership level
2. Set and refine your strategic direction
3. Make decisions about how to govern ongoing and future work in ServiceNow

This is a very effective approach and works significantly better than ad hoc leadership meetings when something comes up or goes wrong.

Be mindful not to rely only on a cadence of governance board meetings to provide effective governance. Cadence doesn't necessarily structure how decisions are made, or on what. Instead, define how to support the decision-making process that those boards should follow.

Best practice – Establish clear separation in decision-making processes between strategy, technical, and portfolio governance

This is often done by establishing multiple separate governance boards—for example, one that makes decisions on technical governance and another that makes strategy governance decisions—but that doesn't have to be the case. What's most important is that, regardless of what boards you form, you consciously acknowledge that there are different types of governance decisions that need to be made and that different decision-makers might be needed to support different types of decisions, like ensuring that leaders making decisions about technical governance are technically oriented. If you don't make this distinction, you risk excluding important stakeholders and their critical expertise to make certain decisions.

We recommend a multigroup approach, forming the three governance boards shown in Figure 2.

STRATEGY GOVERNANCE	TECHNICAL GOVERNANCE	PORTFOLIO GOVERNANCE
Executive steering board <p>Oversees ServiceNow strategy with enterprise service and transformation objectives.</p>	Technical governance board <p>Guides point-in-time technical decisions (e.g., upgrade plans). Ensures technology best practices are documented and adhered to.</p>	Demand board <p>Manages and shapes demand and measures success over time.</p>
PARTICIPANTS <ul style="list-style-type: none"> Executive sponsor Chief information officer (CIO) Business unit/department representative(s) Master architect OCM leader PMO leader Vendor manager(s) Key supplier(s) and partners 	PARTICIPANTS <ul style="list-style-type: none"> Platform architect Platform owner IT process/domain owners Program manager Project manager(s) Business analyst(s) Quality assurance lead Security/compliance lead Development lead User experience lead Data manager 	PARTICIPANTS <ul style="list-style-type: none"> Platform architect Platform owner IT process/domain owner(s) Portfolio/service owner(s) Demand manager(s) Program manager Business analyst(s) Data owner Master architect Vendor manager(s) Key suppliers

Figure 2: Multigroup governance approach

Best practice – Streamline decision-making processes by tracking what decisions need to be made by each board

Maintain an ongoing list of decisions and actions that your governance authorities need to consider. Next, define a process for how your board will make governance decisions. Make sure your process explicitly prioritizes the most important action items from your backlog.

To start, here are the most important decisions each governance board needs to make:

- Executive steering board
 - Does the current ServiceNow roadmap align with your business objectives?
 - How will we revisit and update the ServiceNow vision and roadmap over time?
 - Do we have the right partners and partner management in place?
- Technical governance support board
 - How should we manage the technical aspects of implementations and upgrades?
 - What technical standards should we adhere to for engineering, development, and integration?
- Demand board
 - How do we determine the prioritization criteria for demands for new capabilities, functionality, configuration, and customization?
 - How do we use these criteria to govern demand intake?
 - How do we delegate approvals for low-risk changes?

Best practice – Coordinate collaboration across governance boards

Effective sharing and collaboration across governance boards reduces the risk of uncoordinated or contradictory decisions. Define how your boards will share information and how they'll collaborate across boards after you establish the governance roles and authorities. Standardize how they'll inform decisions and record them into policy across governance bodies, including any governance bodies that may be indirectly related to ServiceNow in your organization.

Give all governance board participants:

- The most up-to-date version of the ServiceNow strategic roadmap to ensure that their decisions align with the strategic direction set by the strategy governance board (commonly referred to as the executive steering board)
- A summary of recent decisions and outcomes from other governance authorities
- A list of any new governance policies

Best practice – Make sure your organizational change management plan supports your governance decisions

A best-in-class governance structure can craft value-adding policies but still not generate positive change. Why? As with most things, you need to effectively communicate your work and sell your organization on the value it provides.

Without marketing the good work you're doing, it's possible that people in your organization will "miss the memo" and continue to do things the way they always have. Harder still, you need to convince people that it's in their best interest to follow the guidelines set in governance policy, so they don't circumvent governance or perceive it as a roadblock.

Consider how you'll deliver new governance policies in a way that your organization will recognize and follow. Be open and communicate the decisions your governance authorities make. Focus your messaging on the new value that policies will enable. One ServiceNow customer advises that it can be helpful to think about this as managing the organizational change caused by establishing new governance. Your plan for organizational change management should account for this, particularly in your [communications plan](#).

It's always worth the time to use these communications as opportunities to educate stakeholders on both the value of governance and on the value of ServiceNow. Make communication planning related to new decisions and policies a part of every board meeting.

Best practice – Consider alternatives to in-person governance meetings and be mindful of participants' time

It's worth thinking about how you can reduce or eliminate the need for board meetings for certain types of decision-making needs, like low-risk decisions or decisions that recur frequently. Processes to support virtual decision-making can be a good way to make decisions faster while saving your governance board members' time.

Here are a couple of ideas for virtualizing governance decision-making:

- Allow absentee ballots for board members who cannot regularly attend meetings.

- Delegate low-risk decisions to team leads and managers to shorten governance meetings and focus agendas on strategic issues, high-risk decisions, and exceptions

INSIGHT 2:

Understand your organizational context before you define policies

Research the governance and compliance that's already in place in your organization. Consider if there are any special requirements for ServiceNow governance, because ServiceNow policies can potentially conflict with already established policies in your organization. Be careful to not blindly adopt any policies you find (unless they're mandatory) without considering how they'll impact your ability to deliver value with ServiceNow.

Best practice – Explore what other work or policy exists that's relevant to ServiceNow governance, even if it wasn't defined explicitly for ServiceNow

A few minor alterations or additional considerations might make an existing process or policy work well for ServiceNow governance needs, saving time and causing less change from your established protocols. Always opt to adopt or adapt existing an policy when it's reasonable, but critically examine that policy first.

If an existing policy accomplishes *exactly* what you need (or can be slightly modified to do so), don't waste time reinventing the wheel. Otherwise, when you develop a new policy that will better support your ServiceNow-specific needs, make sure it doesn't contradict with any existing policy.

Best practice – Understand your organization's "policy culture"

Organizational culture can impact how you should articulate and position a policy so it's most likely to be accepted and followed. Some organizations have more experience with governance than others and are readier to enact new process and policy. These organizations might appreciate more detailed and rigid policy because it's easier to follow and strictly adhere to. In organizations where governance is a newer concept, start by defining guidelines, since a rigid policy might be off-putting and easily criticized as "red tape."

INSIGHT 3:

Start with a minimum viable set of governance policies

Now it's time to record governance decisions into a set of policies. Define a minimum viable set of governance policies—an initial set of draft policies—that will help you avoid technical risks while they guide work on your ServiceNow implementation.

This will help you deliver governance value quickly and avoid maturing any one type of governance policy (like "perfecting" the instance management policy) before considering the full set of different policies you need to govern ServiceNow.

A minimum viable set of policies could include:

- **Platform management policy** – Defines a process to evaluate and mitigate the impact of changes in your ServiceNow instances to maintain platform stability and integrity

- **Instance management policy** – Defines how to right-size environments, replicate instances correctly, develop a security access control model, and ensure proper maintenance
- **Upgrade management policy** – Defines how to plan for and execute upgrades, including a policy that regulates customizations that could hinder future upgrades
- **Platform data governance policies** – Defines data ownership and stewardship roles, sets up data standards and establishes a data dictionary with field descriptions, and manages data synchronization
- **Demand management policy** – Defines how demands—that is, requests for new services or for changes to existing services—are evaluated and prioritized relative to the business value they provide before resources are allocated.

Best practice – Start by defining the extent and degree of control you need to enforce via policy before defining any policy

The extent of control refers to the number of things that need to be regulated by policy. The degree of control refers to how strictly that policy needs to regulate action. Your goal should be to settle on the smallest extent and degree of control possible. Doing this first makes it far easier to assemble a minimum viable set of policies that will protect you against risk and inform your work—without going overboard.

Bear in mind that the extent and degree of control you establish through governance should match your organization's risk tolerance level and not try to avoid risk beyond that. Don't try to completely avoid risk—it's not possible and attempts to do so often result in overly rigid policies that hinder work.

What to do next

Now that you have clearly defined governance authorities, processes, and an initial set of governance policies, it's time to plan how you'll continuously improve ServiceNow governance. Your goal is to iteratively redefine and improve governance.

As you plan for future improvements, be prepared to:

- Reconsider who should be participating in your governance boards to ensure the right people are at the table without taking too much of any one person's time
- Streamline decision-making processes to hasten governance decisions and make the process easier on participants
- Redefine, expand, and/or remove set governance policies to maintain and enforce a realistic set of shared, understandable guiding principles

Remember to focus first on governance improvements that will help your implementation deliver the most value with ServiceNow.

Step 3 – Continuous improvement

KEY INSIGHTS

- Plan ahead how you'll continuously improve governance.
- Focus on maintaining the “right amount” of governance over time.

Best-in-class ServiceNow governance is dynamic: It evolves to reflect what you need to drive your business objectives. As with any minimum viable product, most organizations will likely discover over time that they need to iterate, optimize, and refine their minimum viable set of governance policies.

Determine how you'll revisit and improve governance over time to ensure that you can continue delivering value while mitigating risks.

To do this, complete these action steps:

1. Define metrics to diagnose where governance can be improved.

Define metrics that measure the effectiveness of your governance process and policies and track them over time to identify where you should consider making improvements.

2. Plan how you will identify and remove bottlenecks in governance decision-making.

Set a cadence to review governance board agendas and identify recurring or boilerplate decisions that governance authorities should not have to continue spending time on.

3. Empower local decision-making within enterprise frameworks.

Define how you'll communicate policies to managers and individual contributors so they know how to adhere to governance policies and make decisions accordingly.

4. Enable governance to flex to meet the changing needs of the organization.

Make a plan for collecting feedback from people in your organization about where governance is making their work harder, and streamline governance to address concerns where possible.

Consider these action steps as early as possible—preferably right after defining a minimum viable set of governance policies—to plan for continuous improvement in governance.

Customer insights

ServiceNow's best practitioners advise maintaining the amount of governance that's best for your organization. Read on to learn how.

INSIGHT:

Focus on maintaining the right amount of governance over time

Governance can quickly become a quagmire over time: Policies that aren't revisited and re-evaluated can add up like technical debt, with similar consequences for cost and speed. To avoid this, you need to continuously work to maintain the *right* amount of governance –your set of defined policies should add more value by clarifying decision-making and accountability, than they “cost” in terms of the time and effort required for organizational administration and adherence.

While you can (and should) periodically assess where policy can be removed or modified to maintain the right amount of governance, you should consider this every time new policies are defined. To do this, ask yourself the following two questions every time new governance policies are defined:

1. Does the value of this policy (such as the risk it mitigates or the speed it enables) outweigh its cost (such as the time and burden required for administration and adherence)?
2. After adding this policy, does our full set of policies deliver value that outweighs the cost of administering and adhering to them?

Best practice – Conduct periodic governance audits

We've found that the best way to make sure you maintain the right amount of governance is to get your governance groups to periodically review where they can simplify or merge policies with other existing processes or policies. This goes beyond searching for where you can remove bottlenecks in approval processes. It involves auditing the portfolio of existing governance policies and processes and looking specifically for opportunities for simplification.

You can think about this as a governance audit with the goal of identifying where a policy adds value and should be preserved and refined, and where it's simply red tape and should be changed or removed. You should conduct these audits every time you start work on an upgrade, because upgrades can change how work is done on ServiceNow.

It can help to consider where specific policies fall on a 2x2 chart that plots the value a policy delivers against the burden that policy places on the organization in terms of administration and adherence. See Figure 3.

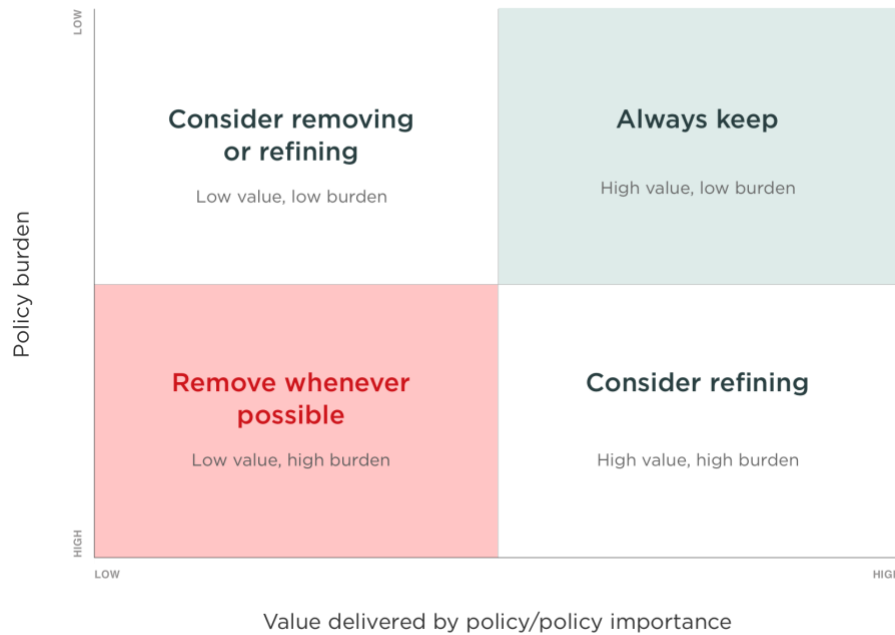


Figure 3: A 2x2 chart plotting a policy's value against the burden it puts on the organization

What to do next

Now that you've defined a plan to make governance dynamic through continuous improvement, your next step is to put this plan into action. Iteratively work your way toward best-in-class ServiceNow governance. Remember that "best-in-class" doesn't mean "overly rigid" or "extensive." Instead, it means that you balance the control you need to avoid risk and drive value with the flexibility you need to get stuff done.

As you conduct governance audits with your boards, block off an hour on your own calendar three months in the future to remind yourself to revisit your established governance model. When you sit down to consider this, involve anybody you've been working on governance with and reflect on how your governance has worked so far, discussing any value adds, delays, etc., and decide how you can improve the process, policies, and teams to deliver better results going forward.

The takeaway

Governance can help you achieve value with ServiceNow faster and more reliably by minimizing technical risk, ensuring that your strategic roadmap supports business needs, and helping work get done faster.

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

Good – You've convinced leadership of the need to establish ServiceNow-specific governance, have defined governance roles and responsibilities, and are convening governance board meetings where decisions are made to inform your direction with ServiceNow.

Better – You've defined an initial set of governance authorities, processes, and policies that standardize how to make decisions and inform work to help you deliver value using ServiceNow.

Best – You have a productive governance board structure and governance policies and processes that you continually refine and improve to help you realize your business goals and your vision for transformation faster.

What should I convey to my team?

First and foremost, the objective of governance is to support value realization and the organization's vision for transformation. While governance does establish a level of control, it's designed to protect against unacceptable risk while enabling the organization to quickly respond to business needs - not to set a punitive code, build bureaucracy or create roadblocks.

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

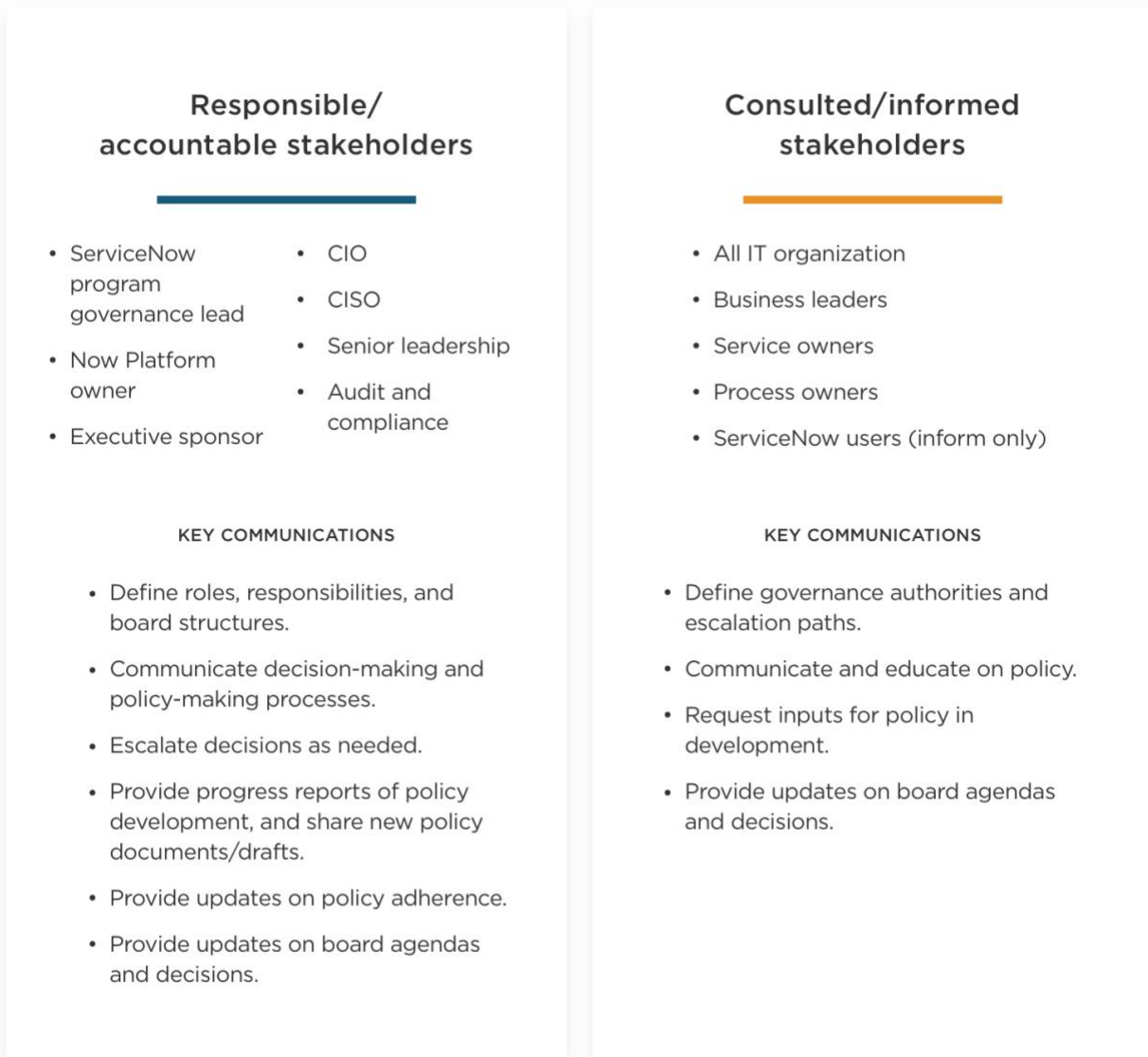
Key performance indicators (KPIs)

To determine if you're establishing ServiceNow governance effectively and delivering value, measure the following top KPIs:

- *% reduction of escalations to governance boards over previous quarter* – Tracking this reduction can help you measure if the governance you've established is informing front-line work and decisions throughout your organization. If escalations don't decrease, it's possible that people in your organization aren't aware of the policies, that they aren't following them, or that the policies don't provide the guidance they need. You can measure this by monitoring the agenda items addressed by your governance boards and identifying the needs that result from escalation.
- *# of defined ServiceNow governance policies* – Simply tracking the number of policies you define provides a quick measure of how much control (i.e., red tape) you've built into your established governance. Rule of thumb – Single-digit measures are likely too low, and triple-digit measures are likely too high.
- *% of policies that have been updated in 24 months* – This indicator can help you track how frequently you're revisiting and improving governance over time. Policies don't have to change, but it's very likely that a significant percentage of your defined policies will need to be updated within any given 24-month period—especially early on.

Stakeholder management

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



Related resource

- [Success Checklist – Build a dedicated, dynamic governance process, policies, and team](#)