

Where to start the implementation journey with ServiceNow

Knowing where to start is the most critical step in your ServiceNow journey. Our best practice resources can help you identify the right sequence and planning approach, based on the business outcomes you envision from your Now Platform implementation.

What's in this Success Playbook

Key takeaways

ServiceNow® can help you improve your IT and enterprise service management with a powerful range of capabilities. This Success Playbook will show you how to:

- Correctly approach the implementation roadmap
- Build adoption momentum and capture early ROI
- Sustain and grow value by implementing the right reference architecture and prerequisites

Knowing how to start will help you avoid common missteps that can keep you from expanding capability and usage.

The most important things to know

- Clearly define and prioritize your short- and long-term ROI goals and match them to your implementation priorities.

- Make sure you have a foundational configuration management database (CMDB), as well as processes for CMDB development and maintenance.
- Identify and capture quick win opportunities to drive early adoption momentum.
- Don't wait to build effective governance, training, and organizational change management.
- Revisit the service strategy frequently and avoid repeating patterns that limit future opportunity.

The payoff of getting this right

With the right implementation plan, you'll ensure that your implementation activities deliver on your business case objectives, maximize value realized from overall ServiceNow implementation, and avoid pitfalls or unnecessary detours that don't contribute to your success.

Playbook overview

Follow these stages for recommended approaches on key decisions and how-to guidance:

Stage 1 – Understand the management capabilities for success

Stage 2 – Connect vision and strategy to implementation

Stage 3 – Set Process, Data, and Technology foundations

Stage 1—Understand the management capabilities for success

KEY INSIGHT

- Ensure your implementation roadmap includes developing management capabilities that helps you get the most from your Now Platform implementation. Start by identifying them first.

The success of your ServiceNow implementation depends on more than just technology deployment. You must align people, process, and technology, from the start, to maximize the value you get from your ServiceNow investment.

Before starting the Now Platform implementation, get an overview of the four Success Pillars and underlying management capabilities that ServiceNow recommends its customers to build and continuously mature throughout their ServiceNow lifecycle. See Figure 1 for the Success Pillars and underlying management capabilities.

State and measure your business goals	Actively lead the transformation	Get your ServiceNow foundations right	Create excitement, drive adoption
1 State your transformation vision and outcomes	1 Engage an executive sponsor to drive change and remove roadblocks	1 Manage to out of the box	1 Design an engaging self-service employee and customer experience
2 Build your business case	2 Find, manage, and coordinate capable, certified partners	2 Discover and map your service assets	2 Design an optimal agent and rep experience
3 Build a phased program plan, identify quick wins	3 Build a dedicated, dynamic governance process, policies, and team	3 Plan your architecture, instances, integrations, and data flows	3 Create a change management plan
4 Baseline and track performance, usage KPIs, and metrics	4 Reimagine how you want work processes to flow	4 Plan for upgrades at least once a year	4 Build an internal team of ServiceNow experts and train users
	5 Define and map out your business services		5 Build a community of champions
	6 Manage platform demand		

Figure 1 ServiceNow Implementation Success Pillars and Management capabilities

Invest in building relevant capabilities as applicable to your implementation stage. Get started by building a personalized, step-by-step action plan that's based on implementation practices of successful ServiceNow customers.

State and measure your business goals

Define your vision for digital transformation, create your business case and roadmap, and measure your progress. This vision should be tied to a clear statement of enterprise value and articulated to stakeholders with an outline of actions and milestones.

How to state and measure your business goals upfront

1. State the transformation vision and outcomes that are aligned with the organization's strategic and operational aspirations and cascade your vision to documented, measurable, business capabilities.
2. Build a business case that provides ServiceNow implementation recommendations, which solve for current key issues and business improvement opportunities.
3. Build a phased program plan and identify quick wins. Then prioritize the right Now Platform capabilities to deliver on short-term goals as you build a robust foundation for capabilities that drive future growth.
4. Baseline and track performance, usage KPIs, and metrics that measure how the solutions implemented on ServiceNow are delivering value and how they enable expected business outcomes.

Actively lead your business transformation

Take the lead on simple workflow redesign, digitizing business services, and building strong partnerships to accelerate your ServiceNow transformation.

How to develop leadership of your business transformation upfront

5. Engage executive sponsors to drive change and remove roadblocks. Clearly define executive sponsor responsibilities and develop an action plan to help your executive sponsors remove roadblocks and drive change.
6. Find, manage, and coordinate capable, certified partners with a partner strategy that defines, upfront, what you need from an implementation partner.
7. Build a dedicated, dynamic governance process, policies, and team with clearly defined roles and responsibilities. Look beyond technical governance, establishing

decision-making authorities for strategy governance and defining strategy governance activities.

8. Reimagine how you want work processes to flow and identify process improvement opportunities based on the desired outcomes of your ServiceNow implementation.
9. Define and map out your business services—a means of delivering value to consumers—with an owner for each business service. Begin with a handful of pilot business services.
10. Manage platform demand with a demand intake model to create visibility and a plan to take control by enhancing, prioritizing, and approving demands.

Get your ServiceNow technology foundations right

Put a solid technical foundation in place for your ServiceNow implementation.

How to build your ServiceNow technology foundations upfront

11. Manage to out of the box with strong, ongoing, stakeholder education on ServiceNow capabilities and functionality.
12. Discover and map your service assets, focusing on the most important business outcomes first.
13. Plan your architecture, instances, integrations, and data flows with a clear view into your transformation objectives for the Now Platform and how these should shape key architecture decisions.
14. Prepare for upgrades at least once a year with a comprehensive plan that accounts for resource requirements, potential upgrade issues, and in-depth test plans.

Create user excitement, drive adoption

Quicken adoption throughout your organization by making the user experience for service consumers, developers, and process users central to your service strategy and Now Platform implementation.

How to create user excitement and drive adoption upfront

15. Design an engaging self-service employee and customer experience with a standard method for defining user experience requirements for service consumers,

developers, and process users. Prioritize improving the end-user experience in implementation.

16. Design an optimal agent and rep experience to improve the satisfaction and productivity of customer support reps and service desk agents.
17. Create an organizational change management plan based on an analysis of the change impact that implementation will have on service consumers, developers, and process users.
18. Build an internal team of ServiceNow experts and train users on an ongoing basis, continuing post implementation.
19. Build a community of champions with dedicated resources and training.

Maturing these areas is an ongoing activity. Some activities are prerequisites. You can develop others in parallel with your Now Platform implementation and mature as platform use increases. We recommend separating management activities and goals into a prerequisite phase, a phase that should run in parallel with the initial implementation, and a phase that runs in parallel with Now Platform growth and expansion.

Stage 2— Connect vision and strategy to implementation

KEY INSIGHTS

- Start your journey by defining your vision, drivers, desired outcomes, and measures of success.
- Run a gap analysis between current and needed IT business capabilities.
- Build a plan that includes your baseline, future-state requirements, and actions to reach your goals.

Connect vision with value definition

Start your Now Platform implementation by clearly defining its role and value as a strategic partner in driving digital transformation through workflow optimization, automation, and predictions. We recommend a visioning exercise with key IT and business stakeholders who can identify and articulate opportunities for business value.

Ideally, the visioning exercise should articulate a clear view of your:

- **Vision** – What's the ideal future state for our customers and team?
- **Strategic drivers** – What actions are necessary to achieve this vision?
- **Desired business outcomes** – What business value will we realize?
- **Key measures of success** – How will we know when we've realized our targeted value?

Frame the answers on a single page to ensure focus and clear connective logic between your vision to your measures of success. See figure 1 for an example. For additional guidance, refer to our [Success Checklist: State your transformation vision and outcomes](#).

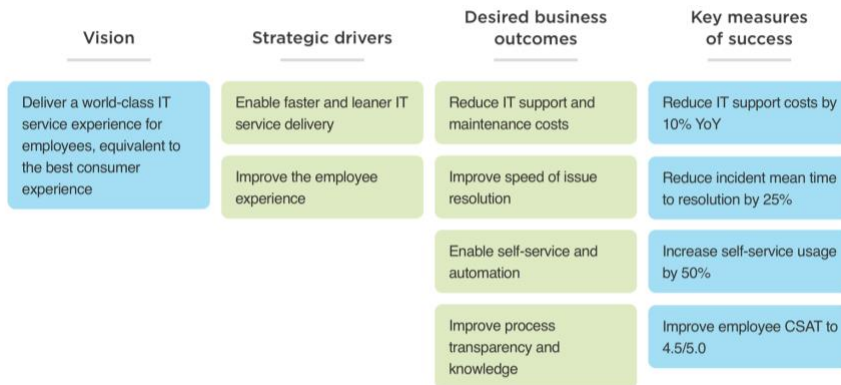


Figure 1: Sample definition of vision to measures of success

Not all organizations start with this view. Organizations that approach the Now Platform as a “rip-and-replace, lift-and-shift” alternative to their current ticketing system limit a full view of their ServiceNow implementation potential. Even in these cases, you can still define your vision-to-value path and identify opportunities to gain additional value from the Now Platform.

Get with your key business stakeholders and go over the interview sequence below to generate a clear, measurable definition of business objectives—and to identify potential challenges to realizing those objectives. These objectives should be clearly documented and maintained as part of the ServiceNow business case. Refer to [Success Playbook: Build your business case](#) for additional guidance.

QUESTION	EXAMPLE
What business outcome(s) do we want to achieve?	We want to reduce IT support costs.
What's the current condition associated with this outcome?	Our costs are 10% above industry benchmarks.
What problems or obstacles are keeping us from realizing this outcome?	We're maintaining multiple service desks and tools (more than industry average). This creates challenges caused by depending on expert knowledge to resolve incidents.
What future state can we envision to realize our outcome?	We will have rationalized our toolsets to a single source of truth and reduced our dependency on L2/L3 staffing.

What **success criteria** define whether we've accomplished our business outcome?

Our IT support costs will be at or below the industry median benchmark.

Table 1: Sample business objectives definition questions¹

¹ These questions should be used as the starting point for interviews to arrive at a measurable definition of business objectives. Responses to these questions may require more detailed analysis. However, the root causes behind problems or obstacles may be complex, and discussion of the future state will likely require consensus building among stakeholders.

Build an implementation plan based on desired business outcomes

Even when your vision, desired business outcomes, known obstacles, and success criteria are clear, do not move directly to implementation. Instead, define your next step on the ServiceNow journey based on:

- An explicit analysis of business and IT capabilities to determine where ServiceNow can deliver the earliest, greatest value to the organization
- A clear, phased understanding of the steps required to implement or optimize those capabilities

Work with your process owners, service managers, functional leaders, and executive sponsor to assess and prioritize ServiceNow capabilities for implementation based on the most critical IT and business-level gaps for your organization. Below are the steps to follow:

1. Identify critical IT and business gaps to resolve

Start with a clear understanding of the business objectives you want to achieve and the business capabilities you would need to build over time to achieve your objectives. For example: Company A wants to reduce—and ideally eliminate—service outages on critical systems. To do so, it must:

- Build capabilities for effective outage management and resolution
- Reduce the impact of outages and improve resolution speed
- Innovate to eliminate service outages

2. Map and assess ServiceNow capabilities that help resolve your business or IT gaps

Next, you need to map ServiceNow capabilities that align with the business capabilities you want to build. For example: The company A must identify, and assess, ServiceNow capabilities that are essential for effective outage management and resolution. These include:

- IT Service Management – Problem, change, and configuration (CMDB) management
- IT Operations Management – Discovery, service mapping
- Analytics – Reporting
- Team – Knowledge, collaboration, notification, on-call, and workflow management
- Integrations and Systems of Record – MID Server

As capabilities in these areas improve, Company A must begin a second phase of assessment that focuses on ServiceNow capabilities that speed resolution and reduce the impact of outages. They are as below:

- IT Operations Management – Event management
- Analytics – Performance analytics
- User engagement and experience – Mobile, service portal

Company A may also need to map a third phase of capabilities to further improve and innovate on the organization's ability to eliminate service outages.

See the Appendix for a full list of potential business and IT objectives, the ServiceNow capabilities that address those objectives, and suggested phases for implementation.

3. Build a phased program plan for the ServiceNow implementation

The analysis done in step 2 above will provide provides the starting point for a logical implementation sequence of your Now Platform modules. Actual sequencing may have substantial overlaps, be limited by resource availability, or be dependent on organizational readiness (such as the extent to which mature process frameworks and data modeling and management capabilities are in place). We recommend building a disciplined, step-by-step program plan that:

- Establishes baseline definitions, standards, and inventories (as needed)
- Defines specific and clear requirements for the future state (such as critical applications to be prioritized in service mapping)
- Spells out a specific list of the build activities required to stand up a new capability

To get started, refer to our [Success Checklist: Build a phased program plan, identify quick wins](#).

4. Capture high-visibility, low dependency quick wins

Progress in implementation and value realization can stumble if you don't have early and strong adoption among service consumers, process users, and developers. Across each phase of your ServiceNow implementation, consider making room for the early implementation of capabilities that:

- Promote the broadest organizational exposure to the Now Platform interface
- Result in highly visible service experience improvements

These capabilities should not overpromise, nor require significant dependencies. For example, effectively implementing service mapping requires strong discovery, event management, and configuration management capabilities, and you also need appropriate scoping and data modeling for your CMDB. Figure 2 shows how you can differentiate quick

win capabilities:

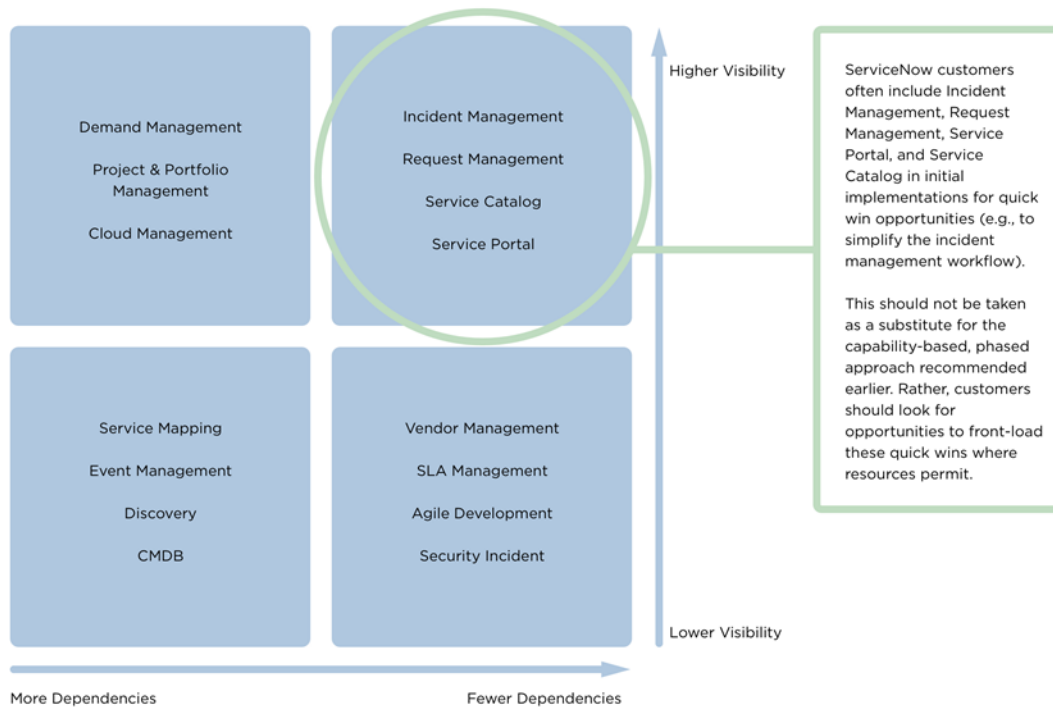


Figure 2: Framework to identify quick-wins (Illustrative—does not include all capabilities or products).

Using ServiceNow Incident Management and Request Management provides the most common high-visibility, low-dependency wins. They combine the elements of self-service and transparency into individual incidents and requests, which exposes service consumers to a modern, automated experience, improves speed of response, and reduces service delivery costs because they reduce manual steps and inefficiencies. However, it's important that implementing incident and request management is kept simple: If the number of workflows that require assessment, consolidation, and streamlining is substantial, you may want to look elsewhere for a quick win.

Invest in organizational change management

Make your new capabilities visible with an organizational change management and communications campaign. For a well-structured organizational change management campaign, be sure to include:

- A change impact analysis to identify the groups most likely to champion or resist implementation

- Targeted communications campaigns to address concerns and overcome adoption obstacles
- Training and skill development for the most impacted user populations
- Identification of adoption champions to evangelize and influence adoption among user populations

For additional guidance, refer to our [Success Playbook: Build an organizational change management plan](#).

Keep your options open—don't focus your initial Now Platform implementation on a single outcome

Instead of focusing your implementation on a single outcome, deploy your initial capabilities with the flexibility to extend the Now Platform to different use cases or functions over time. Ask yourself these questions:

- Does the data model we've established limit flexibility, or does it support extension beyond our original use case?
- Do the security protocols we've established support other potential use cases with more stringent security requirements?
- Do the standards we've put in place for group access, naming, or metadata limit our ability to extend the platform to other use cases or functions?
- Are we deploying the architecture in a way that can support delegated development outside the original function?

Decision Rules to Sequence Deployment in Initial Implementation Phase

Once you've determined a phased deployment of capabilities and aligned it with your desired business outcomes, base your deployment sequencing within the initial implementation phase on a small set of decision rules:

2. Have we developed process or workflow maps to help guide implementation of the capability (such as incident management)?

Prioritize the capabilities you have process or workflow maps for. Avoid prioritizing capabilities not supported by process mapping. See Stage 2 for more information.

3. Do we have the necessary data model(s) in place to support the capability?

Many capabilities are dependent on the CMDB for effective implementation. Prioritize early CMDB development to resolve this dependency. See Stage 3 for more information.

4. How long will it take us to realize value from this capability?

The value of some capabilities is more dependent on your ability to mature associated management activities and skills. Capabilities such as orchestration may have less initial impact on consumers than others, such as a service catalog. Prioritize capabilities with fewer dependencies and broader impact. See Steps 4 and 5 for more information.

Stage 3— Set Process, Data, and Technology Foundations

KEY INSIGHTS

- Run a review to define “as-is” and “to-be” states for the processes you’ll implement.
- Put your desired CMDB model in place before you implement new capabilities.
- Define a clear reference architecture to guard against future technical risks.
- Define clear standards for instance management based on your desired outcomes.

Map the right process foundations

Deployment of any ServiceNow capability should ideally start by mapping the “as-is” and “to-be” processes or workflows. The goal of process mapping is to identify gaps between an as-is and to-be processes that can be translated into requirements and/or user stories for Now Platform implementation.

The as-is state is the baseline for identifying improvement opportunities and for avoiding a “lift and shift” of bad (or incomplete) processes onto the Now Platform.

Start with a simple set of questions to engage process managers and owners:

- What are the key steps involved in this process (or activity)?
- What metrics and KPIs do we use to define the success of this process (or activity)?
- Who are the people involved?
- What tools do we use to support this process (or activity)?
- What information (including metrics) do we collect? How is this information currently managed?

Often improvement opportunities span multiple processes required to be completed to realize a given business value/outcome. Figure 2 shows a breakdown of the key steps involved in incident management as well as a definition of success.



Figure 2: Steps in incident management

ServiceNow recommends running a process review exercise with process owners, to help define the to-be processes. Teams responsible for a process or set of workflows can use simple tabletop exercises or workshops (ideally using historical data) to answer key questions prior to their Now Platform implementation:

- **What's our current baseline?** This should include a definition and mapping of the process as it's currently understood and practiced by teams, including any gaps, potential redundancies, and definition(s) of terms.
- **Where can we consolidate and streamline handoffs between teams, individuals, and systems?** Any process review should include a thorough review of handoffs to identify points—most typically for approvals—where handoffs have created unnecessary bottlenecks in a process.
- **Where are we collecting unnecessary data?** Focus on forms and data associated with a process to ensure that requirements for unnecessary data are eliminated.
- **Where are we seeing the longest cycle times? Why?** Process or workflow steps with consistently long cycle times are likely steps requiring the most manual effort. These present opportunities for automation.
- **Where do we have gaps in standards adherence?** Tabletop walk-throughs can also highlight process or workflow steps that do not consistently adhere to standards. ITIL for service management is one example. These present opportunities to improve standardization through automation.

The completed process review exercise can help you understand how the Now Platform should be configured as a single system of record that provides far greater value than your current process or system.

For additional guidance on process review, refer to our [Success Playbook: Reimagine how you want work processes to flow](#).

Put your desired CMDB model in place

Irrespective of your implementation sequence, the most critical foundation is the CMDB. This is true whether you're using an existing system or the CMDB capabilities in the Now Platform.

When should we focus on the CMDB?

Correctly timing CMDB modeling and population is critical to sustaining the momentum of your Now Platform implementation. Two quick questions can help guide your timing:

- Do we need to move quickly and demonstrate early wins? When speed and visibility are more important, implement capabilities that are not dependent on the CMDB to deliver initial value. See Stage 4 for additional information.

- Do we need to build maturity in our existing capabilities or build maturity to support new capabilities? Focus on the CMDB when you need to improve your existing capabilities.

How comprehensive should we be when populating the CMDB?

When you aim to be comprehensive, particularly in the absence of robust discovery tools, your efforts are likely to result in excessive maintenance costs—and fail to deliver clear insight and value. Instead, guide your CMDB population and management by the business outcomes articulated in Stage 1 and the information needed to support the to-be processes you mapped in Stage 2.

How should we populate the CMDB?

The boundaries of the CMDB data model (for the purposes of Now Platform support) should be guided by your desired business outcomes and the planned implementation sequence of your required capabilities and to-be processes. Ask the following questions to define the right CMDB model:

- 1. What is the (limited) set of relevant configuration items we need to define and track to enable our business outcomes and the processes that support them?** Configuration items should be scoped to the asset types (such as servers, storage devices, endpoint devices, and software) and environments (production versus test and development) that are most relevant in enabling a capability and process targeted for implementation.

Examples of configuration item scoping:

- Application servers and storage only—to support basic service mapping
- Full-stack scoping around a specific or critical platform or system—to support change or problem management
- Assets related to employees (such as office location)—to support HR workflow management

- 2. What information about configuration items will provide the greatest practical use?**

Configuration item data can reflect:

- Core asset identifiers
- Contextual information for ad hoc value and ease of use
- Controls required for audit purposes
- Capability information that directly supports decision-making

Ideally, you should focus on identifying capability data, with minimally sufficient data for core identifiers, context, and controls.

A checklist for successful CMDB planning

Support your CMDB implementation with a documented configuration management (CM) or service asset and configuration management (SACM) plan. A successful plan should include the following actions:

- Define a desired CMDB end state based on decision-making use cases, such as evaluating the risk of changes in a production environment. Socialize use cases with stakeholders to ensure they align with your goals and priorities.
- Charter a configuration control board to define governance roles and responsibilities, and ensure they align with your goals and priorities.
- Decide what configuration items, associated data, and dependencies you need to fulfill these use cases.
- Identify and apply consistent naming standards for configuration items.
- Define policies and procedures for integration with change management, verification and audit, status accounting, interface control, and supplier/subcontractor management.

For additional guidance, refer to [Success Playbook: Populate and maintain your CMDB with Discovery](#).

Define a clear reference architecture

Support your Now Platform implementation with a reference architecture that defines technology standards and policies that guard against future risk. At a minimum, a clear reference architecture should include:

- Explicit mapping of ServiceNow capabilities to IT and your business goals
- Guidelines and standards for partner integration (such as LDAP, REST/SOAP web services, and MID Server)
- Guidelines and standards for customization and configuration (such as scoped applications and application inheritance)
- Data models and standards
- Standards for security controls
- Standards for performance

An architectural review board (ARB) should oversee the reference architecture development and activation. ServiceNow generally recommends dividing the ARB into two primary membership groups. The first group should be accountable for the responsibilities

outlined above, as well as the formation of specific working groups. Ideally, membership should be cross-functional (including customer representatives, architects, and other technical experts). The second group is the ARB-Extended team, which is a resource pool of subject matter experts and technical resources that can be formed into specific working groups as needed.

The ARB organization ensures that you consider a complete range of inputs, and it promotes cross-functional accountability. Table 3 outlines a recommended membership structure for an ARB for IT service management.

ORGANIZATION	ITSM ARB ROLE/REPRESENTATION	VOTING SEAT
Service management	ITSM ARB chairperson	Yes
Service management	Process architects	Yes
Enterprise architecture	Enterprise architects	Yes
Application/development	Application development	Yes
Customer success	Voice of customer	Yes
Enterprise technology services	Enterprise technology	Yes
Security operations	Security operations	Yes
	EXTENDED TEAM/TECHNICAL ADVISORY COMMITTEE	VOTING SEAT
Service management	ITIL expert (provisionary member)	No
Service management	IT4IT expert (provisionary member)	No

Table 3: Recommended membership structure for an ITSM ARB

Looking beyond the ARB – A strategy governance board for ServiceNow

Governance is essential for ensuring that your implementation continues to deliver value over time against your business objectives. At a baseline level, you need governance to use the Now Platform to deliver value with minimal technical risk. At more advanced levels, the right governance model can:

- Make sure that your ServiceNow roadmap rapidly identifies and supports changes in business priorities
- Accelerate your ability to deliver value by providing front-line teams with the tools to self-govern development and service delivery

ServiceNow recommends establishing three levels of governance:

1. Strategy governance, which defines how strategy roadmap decisions are made to align ServiceNow functionality to business outcomes
2. Technical governance, which governs the management and stability of the ServiceNow support model
3. Portfolio governance, which articulates how ServiceNow portfolio decisions are made and captured in policy

Assign a small, core group of people to coordinate establishing governance and start with basic strategy and technical governance to enable safe, quick value delivery with the platform. Then proceed to establishing portfolio governance. Do not refine any one area of governance before initiating development across all areas (strategy, technical, and portfolio governance)—your organization must co-develop and refine them over time so they can appropriately inform one another.

For details on how to establish the governance boards, refer to our best practice guidance on how to build a dedicated, dynamic governance process, policies, and team.

Define standards for instance management

Similar to architectural guidelines, support Now Platform implementation by developing and communicating processes for instance management, including:

- Managing security controls such as access management
- Managing performance and operations to include guidance for IT infrastructure and help desk staff
- Defining and overseeing SLAs and OLAs with business stakeholders

As with the CMDB, guide your investment in the right resources for instance management by an explicit set of objectives (and the value you want to see) for implementation and by the level of oversight and effort required to support those objectives.

Investing in the right foundations – Two examples

Company A is attempting to pursue service mapping to improve incident resolution without establishing the right technology and data foundations. Top-down service mapping, without appropriate investments in CMDB and discovery can result in service mapping that does not necessarily improve resolution. Additional investment in these areas might be costly, so decision-makers should take care to ensure that the ROI potential is worth the investment (relative to investment in other capabilities).

Company B has a goal of cost reduction, which it hopes to pursue through continued automation of service desk activities. But it's underinvested in CMDB capabilities, which has caused the return on additional automation investments to be limited in terms of reducing outages or improving its mean time to resolve incidents, many of which require L2 or L3 support staff. After additional analysis, decision-makers determine that the company needs to upgrade its CMDB to improve cost efficiencies—this requires reducing the amount of support needed from L2 and L3 support staff.

The takeaway

Successful ServiceNow implementations are supported with a clear articulation of the expected business value and business objectives they help realize. They are built on strong process, data, and technology foundations that enable future expansions and adoption of the Now Platform.

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

Good—You have a business case and a list of initial ServiceNow capabilities to implement.

Better—You also have an initial implementation plan with ServiceNow capabilities prioritized based on business outcomes.

Best— You have a detailed phased implementation plan that highlights quick-wins, accounts for organizational change and resource needs, and metrics defined for value management.

What should I convey to my team?

Don't jump to implementation new capabilities without analyzing their relevance to your business objectives. Instead build an implementation plan that prioritizes solving for your most important business needs, quick-wins, and builds a strong foundation (for process, data, and technology) for future expansions.

Related resources

- [Success Playbook: Build an organizational change management plan](#)
- [Success Checklist: Build a phased program plan, identify quick wins](#)
- [Success Checklist: State your transformation vision and outcomes](#)
- [Success Playbook: Avoid customization pitfalls so you can innovate and meet demand at scale](#)
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Appendix

The tables below provide additional phase paths that cascade from specific business outcomes to Now Platform capabilities.

Business Outcome: Modernize IT service management		
IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
Phase 1 – Modernize 3. Simplify your current approach: <ul style="list-style-type: none"> Define your current baseline and expected outcomes for IT service management. Roadmap your migration strategy from your current process and toolset(s) to the Now Platform. Assess the quality and scope of your current configuration data. Determine your operational reporting requirements. Identify your highest-value and most common ITSM requests. Identify the “most needed” knowledge articles. 4. Standardize your approach: <ul style="list-style-type: none"> (Re)design your CMDB, including scope of data, and populate. Consolidate processes and implement. Build initial report library. Build initial request catalog. Define minimum viable set of integrations. Build knowledge base for process users. 	<ul style="list-style-type: none"> Incident management Change management Configuration (CMDB) management SLA management Reporting Knowledge management Notification management Business rule management Workflow management Request fulfillment Service catalog 	<ul style="list-style-type: none"> Reduction in incidents caused by changes Reduction in number of touch points to manage incidents or requests Improved delivery of requests
Phase 2 – Transform 5. Build self-service: <ul style="list-style-type: none"> Identify steps needed to promote self-service adoption. Expand service catalog to reflect customer needs. Build self-service knowledge. Identify requirements for management analytics. Build management and executive dashboards. 6. Improve automation: <ul style="list-style-type: none"> Map current release management processes and touch points with development and/or PMO teams. Identify automation opportunities, and (re)design an integrated release management process with development and/or PMO teams. 	<ul style="list-style-type: none"> Problem management Release management Asset management Discovery Orchestration Collaboration 	

<ul style="list-style-type: none"> • Extend the existing CMDB to support asset management. • Deploy Orchestration and Discovery tools. 		
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Business Outcome: Take control of applications, projects, and financials		
IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
<p>Phase 1 – Modernize</p> <p>7. Collect and inventory all applications, demand, and projects:</p> <ul style="list-style-type: none"> • Define attributes related to cost, ROI, and relevance to business capabilities and/or objectives. • Categorize inventories in business-relevant terms. <p>8. Align with the voice of the customer through ideation and price models:</p> <ul style="list-style-type: none"> • Use price models to determine cost/value breakeven across applications and projects. • Use voice of customer exercises to understand demand in terms of “natural units of consumption.” 	<ul style="list-style-type: none"> • Incident management • Change management • Configuration (CMDB) management • SLA management • Reporting • Performance analytics • Request fulfillment • Service portal • Demand management • Financial management • Application portfolio management • Project and portfolio management 	<ul style="list-style-type: none"> • Reduction/ rationalization of applications under management • Reduction in demand cycle time • Reduced cycle time for budget/project portfolio planning • Reduced project cycle time
<p>Phase 2 – Transform</p> <p>9. Execute with agility:</p> <ul style="list-style-type: none"> • Use the Now Platform to manage delivery of projects from end to end. • Create meaningful application categories (e.g., by value delivered, or associated service). • Start using the Now Platform to make service-aware planning decisions. <p>10. Deliver business-driven value:</p> <ul style="list-style-type: none"> • Align application and project portfolios and budgets with enterprise and line-of-business strategy. • Deliver and measure value-focused IT services. 	<ul style="list-style-type: none"> • Problem management • Release management • Asset management • Resource management • Agile development • Test management • Knowledge management • Notification management • Business rules management • Workflow management • Collaboration • Time tracking • On-call management • Service catalog 	

Business Outcome: Eliminate service outages		
IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
Phase 1 – Modernize 11. Define critical services: <ul style="list-style-type: none"> Define your current service portfolio/taxonomy. Define SLA commitments for top applications. Define the current scope of your CMDB. Prioritize critical applications for service mapping. 12. Discover data availability: <ul style="list-style-type: none"> Populate CMDB as needed to include reconciliation and normalization of configuration items. Define processes and controls to update the CMDB. Map critical services in the CMDB 	<ul style="list-style-type: none"> Problem management Change management Configuration (CMDB) management Discovery Service mapping Reporting Knowledge management Collaboration Notification management On-call management Workflow management 	<ul style="list-style-type: none"> Reduction in incidents related to changes Reduction in change planning time Decrease in incidents Decrease in outage MTTR Decrease in major outages
Phase 2 – Transform 13. Consume service monitoring data: <ul style="list-style-type: none"> Create connections to third-party monitoring tools. Ingest metrics and events and map them to configuration items and services. 14. Measure service health and react: <ul style="list-style-type: none"> Build service health dashboards, using “out of the box” health dashboards and reports where feasible. Define KPIs and thresholds for health monitoring. Define alerts and notification groups. Define standard remediation actions, triggers, and workflows. Create automated process scripts to orchestrate remediation. 	<ul style="list-style-type: none"> Event management Service portal Mobile Performance analytics 	

Business Outcome: Resolve real security threats fast		
IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
Phase 1 – Modernize 15. Build the inventory: <ul style="list-style-type: none"> Inventory authorized devices and software. Identify services needing protection. 	<ul style="list-style-type: none"> SLA management Configuration (CMDB) management Event management Knowledge management Workflow management 	<ul style="list-style-type: none"> Decrease in time to prioritize and resolve incidents Reduction in backlog of security incidents and vulnerabilities

<ul style="list-style-type: none"> • Inventory security controls, enforcement technologies, response playbooks, and orchestration endpoints. <p>16. Connect security workflows:</p> <ul style="list-style-type: none"> • Connect security alert sources. • Connect vulnerability scanner information. • Connect asset discovery mechanisms. • Connect email distributions and notifications. • Connect additional threat information sources, scanners, and feeds. • Connect orchestration endpoints. 	<ul style="list-style-type: none"> • Business rules management • Security incident response • Vulnerability response • Service portal • Request management 	<ul style="list-style-type: none"> • Reduction of business risk through visibility into critical services • Reduced time spent on enrichment tasks through automation and threat intelligence
<p>Phase 2 – Transform</p> <p>17. Configure security operations:</p> <ul style="list-style-type: none"> • Define role-based access. • Configure security incident and vulnerability workflows. • Configure threat intelligence sources. • Develop business criticality and risk calculators. • Build SLAs, dashboards, and reports. <p>18. Launch new security workflows:</p> <ul style="list-style-type: none"> • Publish security request catalog. • Develop standard post-incident assessments. • Standardize threat intelligence collection. • Establish automated security incident and vulnerability responses. 	<ul style="list-style-type: none"> • Incident management • Problem management • Change management • Performance analytics • Threat intelligence • Discovery • Service mapping • Collaboration • Notification management 	

Business Outcome: Consumerize the employee service experience		
IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
Phase 1 – Modernize 19. Build the inventory: <ul style="list-style-type: none"> Inventory authorized devices and software. Identify services needing protection. Inventory security controls, enforcement technologies, response playbooks, and orchestration endpoints. 20. Connect security workflows: <ul style="list-style-type: none"> Connect security alert sources. Connect vulnerability scanner information. Connect asset discovery mechanisms. Connect email distributions and notifications. Connect additional threat information sources, scanners, and feeds. Connect orchestration endpoints. 	<ul style="list-style-type: none"> SLA management Configuration (CMDB) management Event management Knowledge management Workflow management Business rules management Security incident response Vulnerability response Service portal Request management 	<ul style="list-style-type: none"> Decrease in time to prioritize and resolve incidents Reduction in backlog of security incidents and vulnerabilities Reduction of business risk through visibility into critical services Reduced time spent on enrichment tasks through automation and threat intelligence
Phase 2 – Transform 21. Identify other services outside of HR: <ul style="list-style-type: none"> Identify IT, facilities, legal, finance, and other services needed to make the new service work. Define cross-departmental SLAs. Assign a knowledge base manager and content subject matter experts. 22. Create lifecycle service: <ul style="list-style-type: none"> Create your new HR service, pulling in relevant HR and other services as needed. Assign tasks and cases as appropriate. Define escalations. 	<ul style="list-style-type: none"> Collaboration Notification management Performance analytics Service catalog Mobile 	

Business Outcome: Resolve customer issues fast

IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
<p>Phase 1 – Modernize</p> <p>23. Engage customers:</p> <ul style="list-style-type: none"> Define expected customer outcomes and your current baseline. Offer customers self-service via service portal. Build a customer knowledge base. Develop a migration strategy for your current tools and process. Design a case management process flow. <p>24. Streamline customer interactions:</p> <ul style="list-style-type: none"> Consolidate systems. Develop a master data management and integration strategy. Develop case management workflow/skill-based routing to customer service agents. Build an agent knowledge base. Develop survey capabilities for customer feedback and/or NPS. Migrate or integrate case history. 	<ul style="list-style-type: none"> Customer service management SLA management Knowledge management Workflow management Collaboration Service portal Reporting 	<ul style="list-style-type: none"> Increase in cases deflected through knowledge Reduced time spent resolving cases Improved first call resolution Reduced average case handling time Improved customer and agent satisfaction Improved NPS Improved customer retention Reduction in customer effort
<p>Phase 2 – Transform</p> <p>25. Connect Customer Service Capabilities.</p> <ul style="list-style-type: none"> Deploy additional support channels. Expand the service catalog. Understand management analytics requirements and build management/executive dashboards. Review and develop health checks for your system configuration. <p>26. Build collaboration across customer service:</p> <ul style="list-style-type: none"> Identify process touch points with IT and other parts of the enterprise. Extend customer support through field service. Use incident, problem, and change management to resolve customer issues permanently. Optimize knowledge bases and expand to communities. 	<ul style="list-style-type: none"> Incident management Change management Problem management Configuration (CMDB) management Field services management Performance analytics Service catalog Mobile Request management Notification management Open frame 	

Business Outcome: Optimize performance with real-time analytics

IMPLEMENTATION PLAN ACTIONS TO REALIZE VALUE	SERVICENOW CAPABILITIES BY PHASE OF IMPLEMENTATION	Value Metrics
<p>Phase 1 – Modernize</p> <p>27. Define the analytics roadmap:</p> <ul style="list-style-type: none"> • Define data quality standards. • Assess reporting process integrity. • Assess stakeholder confidence in current reporting. • Assess stakeholder cultural acceptance of analytics-driven decision-making. <p>28. Establish a baseline for analytics-driven improvement:</p> <ul style="list-style-type: none"> • Define current state of service performance. • Visualize metrics. • Incorporate and run meetings around performance analytics. • Prioritize work based on analytics. 	<ul style="list-style-type: none"> • Incident management • Problem management • Change management • Configuration (CMDB) management • Release management • Asset management • SLA management • Service portal • Request management • Reporting • Performance analytics • Knowledge management • Workflow management • Business Rules Management • Collaboration • Notification management • On-call management • Time tracking management • Open frame 	<ul style="list-style-type: none"> • Reduction in number of reporting tools • Improvements in data accuracy • Improvements in employee productivity • Improvements in operational efficiency for services
<p>Phase 2 – Transform</p> <p>29. Improve performance with analytics:</p> <ul style="list-style-type: none"> • Review service performance and set optimization targets. • Define plans to address performance gaps. • Use analytics to align stakeholders and report on progress towards optimization targets. <p>30. Refine analytics:</p> <ul style="list-style-type: none"> • Assess effectiveness of KPIs in guiding optimization. • Adjust metrics and visualizations. • Calibrate optimization targets based on assessment. 	<ul style="list-style-type: none"> • HR management • Facilities management • Customer service management • Discovery • Event management • Service mapping • Orchestration • Cloud management • Vendor management • Security incident response • Vulnerability response • Threat intelligence • Service catalog 	

Five implementation success factors

The below five success factors can increase your implementation success:

Success Factor 1 – Clearly define and prioritize your short- and long-term ROI goals and match them with your implementation priorities. Before implementation, use the business case and capability roadmaps to define and rank the business value you expect from your Now Platform® implementation. Be sure to look at both initial deployment and growth opportunities.

Success Factor 2 – Make sure you have a foundational configuration management database (CMDB) model, as well as processes for CMDB development and maintenance. To achieve the potential of the Now Platform capabilities, you need effective configuration management. Put baseline capabilities in place for CMDB modeling and maintenance. Start with a simple or bounded set of configuration items (CIs), and expand these as capabilities mature.

Success Factor 3 – Identify and capture quick win opportunities to drive early adoption momentum. For example, request fulfillment, incident management, and a service catalog provide high-visibility, low-cost opportunities to quickly engage a large base of users in requirements development, acceptance testing, and usage. Successful engagement will help you build momentum for the rollout and consumption of additional capabilities.

Success Factor 4 – Don't wait to build effective governance, training, and organizational change management. Implementation efforts often prioritize technical activities over management activities that can actually provide greater value. Ideally, the start of a ServiceNow journey should include resources and executive support for developing a governance operating model, training and skill development, and organizational change management.

Success Factor 5 – Revisit the service strategy frequently and avoid repeating patterns that limit future opportunity. Don't limit ROI potential assessment to the initial Now Platform deployment. Adoption growth will likely uncover new opportunities and priorities, especially beyond IT. Avoid making pervasive decisions based on individual focus areas in the initial implementation, and you'll have more opportunities to extend the Now Platform to new functions and use cases. Now Platform leads and sponsors should regularly engage with business stakeholders to identify new opportunities to improve enterprise service value.