

Find, manage, and coordinate capable certified partners

What's in this Success Playbook

This Success Playbook will teach you the process of finding and managing a partner who will help you capture the full value from ServiceNow. You'll learn:

- To define and establish a partner strategy that's aligned to your business objectives
- To identify the insights you need to search for, evaluate, and select a certified partner
- The necessity of coordinating, measuring, and managing your partner
- To determine how a strategic partner can help you identify transformation and innovation opportunities beyond your initial business outcomes

Key takeaways

The most important thing to know

Your choice of an implementation partner is just as important as your choice to use ServiceNow, but many organizations don't put enough effort into properly vetting partner quality during the selection process. Finding and selecting the right partner is critical—and getting out of a bad partner selection can be time consuming and costly.

The payoff of getting this right

You'll have a partner who delivered a successful ServiceNow implementation that resulted in achieving all or part of your organization's vision for transformation and desired business outcomes. Your initial ServiceNow implementation may be the start of a long-term, strategic relationship.

What you need to get started

Leadership support

You'll need your executive sponsor, key IT and business partners, and other subject matter experts to help create your partner strategy and provide input to the partner evaluation process.

When you should start this activity

Your partner search should begin when you begin evaluating ServiceNow as your solution of choice. Ideally, you'll complete your partner onboarding as you start your implementation so you can meet your desired project timeline.

If you already have a partner strategy in place, you may need to update it based on your goals for ServiceNow and digital transformation.

Playbook overview

ServiceNow recommends six steps to find, evaluate, select, onboard and manage a partner that will help you capture full value from ServiceNow.



If you haven't explicitly defined a partner strategy with your executive sponsor and stakeholders—one that incorporates your vision for digital transformation—start with [Step 1](#).

If you currently have a partner in place, you may want to start with Steps 5 and 6 to improve how you're managing your partner strategy.

Step 1 – Define and establish a partner strategy

KEY INSIGHTS

- Don't just define partner requirements at a tactical level—a comprehensive partner strategy includes requirements that reflect your transformation vision and desired business outcomes.
- Tap into the expertise of key stakeholders early. Include cross-functional expertise in your partner evaluation team.
- Ask for project management resources to steer the partner evaluation and selection process.

Define and establish your partner strategy early so you can make sure you're aligned with your larger vision for transformation. When you prepare your requirements before implementation, you'll be more effective in the partner evaluation and selection process—and your partner will be able to deliver on your implementation needs.

To define your partner strategy, complete these action steps:

1. Define your partner requirements.

The first step in any partner strategy is to define what you need from a partner – in terms of the skills and experience with the ServiceNow products you need, the support you expect, and how your partner will handle incidents and support.

2. Define the metrics that include the partner in the contractual agreement.

Establishing service level agreements (SLAs) early helps support the partner evaluation process and promotes accountability. Also establish goals for your partner to train your internal team and improve optimization.

3. Build an evaluation team.

Engage the right internal stakeholders early to support the decision-making process, gain support from business partners, and assist with the onboarding and management process.

Customer insights

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

INSIGHT 1:

Make sure your requirements reflect your vision and desired business outcomes

Your organization may already have a partner strategy or possibly even a generic set of partner requirements. Or maybe you began defining requirements at a tactical level. If so, you're missing the big picture.

Your partner requirements should reflect your vision for transformation and your desired business outcomes. It's not enough to have a requirement, for example, that your partner have experience with Incident Management. Instead, the requirement should reflect that the partner *has demonstrated experience implementing Incident Management to improve incident resolution speed*, ideally in organizations of a similar scale.

Best practice – Define what constitutes a successful partner fit

Before you start defining requirements at a tactical level, work with your executive sponsor to define what constitutes a successful partner fit for your ServiceNow implementation.

You should ask:

- What should we look for to determine if a partner is the right fit for our organizational culture (and any change we want to drive in our culture)?
- What kinds of partner experiences would give us confidence that a partner can deliver on our vision and business objectives?
- What red flags would signal to us that a partner is *not* a right fit for our needs?

EXPERT TIP

Think about a relationship with a partner that can broadly help you meet your digital transformation goals versus choosing one with a more product-centric view. You can also add niche or subcontracted partners to the mix to help supplement your project.

Best practice – Document your ServiceNow licensing for clarity during partner evaluation

To provide clarity during the partner evaluation, and then during the implementation process, document in your partner strategy what ServiceNow product licensing your organization purchased.

Having this insight will help:

- Provide an understanding of what ServiceNow product expertise your partner will need to have for your project
- Give the partner critical insight into the scope of your implementation project, which they need to appropriately respond to your requests in the evaluation process
 - Example: If you purchased HR Service Delivery licenses and the partner lacks certified staffing or has resource constraints for that product, they may explore a subcontractor relationship to fill the gap or decline your project request. Having this information upfront is important to making this decision.

- Avoid downstream confusion for your project team and partner on the products that you'll implement
 - Example: If the partner doesn't have clarity on the products your organization purchased, they could unknowingly create custom or scoped applications to address business needs.

INSIGHT 2:

Build the broader team as early as possible

Your choice of partner will affect the key IT and business stakeholders throughout your organization. If you neglect to include those stakeholders in defining a partner strategy, you'll miss out on the opportunity to tap into their collective expertise to support a comprehensive definition of requirements, and to make smart evaluations of potential partners.

Best practice – Determine potential stakeholder roles

As you begin to define your strategy, approach potential stakeholders and collaborate with them to determine what role they will play in partner selection and management. Ideally, work with your executive sponsor to build and communicate a Responsible, Accountable, Consulted, and Informed (RACI) chart like the one in Figure 1. Using this RACI, stand up a partner evaluation team. This team should:

- Be cross-functional to avoid bias or groupthink in the partner evaluation process.
- Contain the full range of expertise needed to support a comprehensive evaluation.

Conduct a kickoff session with this team to establish a common understanding of the business case and partner requirements and to explain the team's roles and responsibilities.

Partner Evaluation Team RACI CHART (Roles and Responsibilities Matrix)

	Platform Team	CIO	Executive Sponsor	Procurement	Legal	Security	Service Owner X	Process Owner Y	Service Owner X
Craft partner strategy	R	A	A	I	I		I	I	I
Search for prospective partners	R	A	A	C	I	C	I	I	
Evaluate prospective partners	R	A	A	A	C	C	C		
Onboard partner	R	I	A			A	C	C	I
Manage partner	R	C	A			I	C	C	I

R: Responsible, **A:** Accountable, **C:** Consulted, **I:** Informed

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Figure 1: partner evaluation team RACI

EXPERT TIP

Consult with your procurement team to learn about the internal resources you have who can realistically evaluate vendors.

INSIGHT 3:**Enlist project management resources**

It's not likely that you'll *only* be working on partner evaluation and management—most teams wear multiple hats and conduct several activities at the same time. But if you don't allocate sufficient resources to carry out and manage your partner strategy, the strategy will be less effective.

Best practice – Ask for a project manager

Using a project manager to manage your partner selection process can help keep the process on target to meet your implementation deadlines and allow you more time for strategic focus and better decision-making.

What to do next

Now that you've laid the foundation for your partner strategy, you're well prepared to develop your list of candidates to evaluate and then select the right one for your implementation.

Be prepared to revisit how you've defined requirements and your evaluation team, especially when:

- Your executive sponsor changes
- Your vision and business objectives change, or you expand ServiceNow capabilities
- You cannot identify a good list of partners
- You need to replace your existing partner

Like any good strategy, your partner strategy should be considered a living document—review it at least once or twice per year.

Step 2 – Search for prospective partners

KEY INSIGHTS

- Don't rely on a single or limited source for identifying prospective partners. Instead use multiple channels to build a comprehensive, targeted list that matches your partner strategy.

Once you've created a partner strategy and built a partner evaluation team, it's time to search for prospective partners to evaluate. The ServiceNow ecosystem of partners is abundant, ranging from smaller boutique firms and specialized partners to larger global system integrators. Performing a comprehensive and targeted search for prospective partners is an essential start to supporting a thorough evaluation and selection process.

To do this, complete these action steps:

1. Create qualification assessment criteria for prospective partners.

Using the partner strategy you created in Step 1 as guidance, create qualification assessment criteria that will give you direction as you research and identify prospective partners.

2. Assemble a list of prospective partner candidates.

Thoroughly research your vendors to assemble a list of prospective partners for evaluation.

3. Select four to six prospective partners to target with requests for information.

Distribute a request for information (RFI) to four to six prospective partners, then evaluate their responses with your partner evaluation team to create a short list of three to four partners for deeper evaluation.

Customer insight

Our customers recommend that you keep this insight in mind as you search for partners.

INSIGHT:

Use a comprehensive set of sources

When searching, some organizations rely on a single (or limited) source for identifying prospective partners. But singular or limited inputs aren't enough to get you the right list. Every source of data, even trusted word of mouth, contains some bias and needs to be balanced against other sources and perspectives.

Best practice – Use multiple channels to research vendors and assemble a targeted list of potential partners

You can build this list from the following channels within the ServiceNow ecosystem:

- Review the options on the [ServiceNow Find A Partner](#) website.

- You'll only find ServiceNow certified partners here, so if a vendor is not listed, they're not certified.
- Engage with your ServiceNow account executive for referrals.
- Attend ServiceNow events such as [Knowledge, Now at Work](#), and [SNUGs](#) for opportunities to engage with partners directly and talk to other customers about their partner experiences.
- Talk with reference customers who are willing to share their experiences.
- Research partners on sites like [Hoovers](#).
- Use groups like the [ServiceNow Community](#) to get customer references when needed.

EXPERT TIP

Typically, organizations will turn to a partner they've worked with in the past. But past experience alone is not a predictor of future performance, especially if your business needs have changed. Exercise due diligence and seek out additional partner candidates who can offer you a new perspective on your vision for transformation.

What to do next

With your comprehensive search complete, your RFI process should have given you a short list of three to four partners to look into further so you can find the best match to deliver on your vision for transformation.

Your partner strategy may involve multiple partners based on the unique needs of your ServiceNow project. Think about your business objectives and roadmap when you search for partners, because you may need to revisit options that could become a fit in the future. For example, you may find a partner that specializes in implementing IT Operations Management but who isn't a broad fit for other parts of your ServiceNow roadmap.

Step 3 – Evaluate prospective partners

KEY INSIGHTS

- Create a master list of questions to interview prospective partners and determine if you have a candidate that matches your partner strategy.
- Use anecdotal data from qualitative as well as quantitative measurements when determining a partner's cultural fit and ability to address your business needs.
- Identify signals from partner stories that will help provide evidence of a potentially strong, collaborative relationship.

With your short list of prospective partners, it's time for a deeper evaluation. Your choice of an implementation partner is just as important as your choice to use ServiceNow, which means that you need to put in the right amount of effort into properly vetting partner quality during the selection process.

It's critical that you perform a thorough evaluation of your prospective partners before you make your selection. Backing out of a bad partner selection is both time consuming and costly.

To perform a targeted search for prospective partners, complete these action steps:

1. Notify partners through the RFI evaluation that they've been selected for the next stage of the evaluation process.

The next stage of the evaluation includes writing a request for proposal (RFP) and sending it to your short list of prospective partners. When you write the RFP, incorporate requirements from your partner strategy and collaborate with your partner evaluation and procurement teams for guidance. Using an RFP process allows prospective partners to provide a deeper level of detail about their capabilities and customer references than an RFI. An RFP helps your organization make more insightful decisions to narrow down the prospective partner list before selection.

2. Narrow down and evaluate the remaining partner candidates.

Evaluate your RFP responses using a scorecard or evaluation criteria, and then contact the prospective partners' customer references. Based on this, identify two to three partner candidates for final evaluation. Finally, review the final two to three candidates, also reviewing the statements of work (SOWs) and pricing. This should give your team the depth it needs to make a selection.

Customer insights

Our customers say to keep these three insights in mind as you evaluate partners.

INSIGHT 1:

Create a comprehensive list of questions to elicit your partner's perspective

The questions you ask your partner candidates shouldn't be pro forma or generic, or limited to the technical details of implementation. You should look at the questions you ask as your best opportunity to gain insight into your partner's perspective, both on how to get value from ServiceNow and capture business value from digital transformation. Always err on the side of having a more thorough, comprehensive set of questions to get this perspective.

Best practice – Create a master list of questions for partners to answer

To ensure a thorough evaluation of partners, create a master list of questions for your partners to answer. Use your RFP responses to score their responses. If you've completed other engagements with potential partners, like "partner evaluation days," use that information as well.

Here are examples of common questions to ask partners, but you'll need to tailor them based on your specific preferences and the products you plan to implement.

System implementation basics:

- What services do you offer (training, support, outsourcing, etc.)?
- What ServiceNow products (ITSM, HR, CSM, SAM, etc.) is your organization's staff certified in?
- What percentage of staff are ServiceNow certified?
- What's the average tenure of the team working with ServiceNow products?
- What are your approaches to engagement (complete drop-in package, some "canned" and some custom, all custom)?
- What's your SDLC methodology (Agile, Waterfall)?
- What type of support model do you offer (email, phone, portal, chat)?
- Where is your staff located (locally, offshore)?
- Do you follow the recommended ServiceNow Implementation Methodology (SIM)?

Digital transformation experience:

- What's your experience with moving organizations to the cloud?
- What's your experience with implementing ServiceNow mobile-enabled products?
- Can you provide examples of manual business processes you automated with ServiceNow workflows for your customers? (Ask these for the applicable product capabilities you plan to implement on your roadmap, like employee onboarding for HR)
- Can you provide examples of when you helped transform an organization's employee and/or customer experience?
- What's your experience implementing innovative ServiceNow functionality, like agent intelligence?

- Can you provide case studies and references of customers you helped achieve digital transformation goals with ServiceNow?

EXPERT TIP

If you don't have any internal resources with ServiceNow experience to help you build your evaluation assessment, consider retaining an expert as advisor. To find an advisor, use the ServiceNow ecosystem mentioned in Step 2.

You'll find additional information about certified partners on the [ServiceNow Find A Partner](#) website, including:

- **Product implementation expertise** – This shows the verified products the partner has implemented, such as Performance Analytics, Service Portal, etc.
- **Number of certified professionals by product** – This includes the type of certification (e.g., Certified Implementation Specialist, Certified Application Developer, etc.), the product focus, and the number of certified staff by certification type.
- **Customer satisfaction rating** – The ServiceNow Partner Program requires implementation partners to register their services engagement projects. Upon project completion, ServiceNow conducts customer surveys on behalf of partners with mutual customers to measure success and gather feedback, which is used to continually improve partner performance. Each partner on the [Find A Partner](#) website displays a showcase of a rolling 12-month average score of survey results. Results are refreshed monthly, and eligible partners must maintain a CSAT rating of 8.5 or above from a minimum of 6 respondents. The CSAT scale ranges from 0–10 with 10 being the highest possible score. Each partner's CSAT rating is equal to a rolling 12-month average score of customer responses received across all completed engagements.
- **Country and region coverage** – This lists each region and country the partner does business in.
- **Certification status** – The partner's certification status is either Registered, Specialist, Premier, or Elite, and they achieve it through a strict set of qualifications that ServiceNow frequently reassesses, such as the number of ServiceNow certified staff they have, the number of registered implementations they have completed, and their customer satisfaction survey scores.

EXPERT TIP

Heavily consider the ServiceNow products your partner is certified on and experienced with during your evaluation process. Selecting a partner with deep experience in the products you plan to implement, that also has certified staff on those products, will make your implementation infinitely more successful.

Lastly, ask the partner to provide you resumes/CVs of the staff who will work on your project. This will give you an opportunity to validate the level of ServiceNow product expertise, insight into certifications, and location of the staff, which can factor into your decision-making preferences.

Location can be a key factor because some organizations want their partner staff to be local for face-to-face access or because having a local team reduces travel costs when onsite engagement is needed. Other organizations don't have concerns with virtual or offshore partner support. When the partner uses offshore staff, it can also be a cost reducer for your project.

With your agreement, the partner could also supplement your project with subcontractors or additional niche partners. Make sure to get the resumes or CVs for those staff as well. In the end, getting access to resumes will help you determine if you are getting the "A team" based on your project's requirements.

INSIGHT 2:

Balance data with stories in your evaluation process

Some organizations tend to overemphasize partner cost in the evaluation process, relative to the value a partner can bring to the table. Evaluating primarily on costs versus the benefits partners can provide may leave you with a partner that does the bare minimum to complete your project, impacting your ability to achieve your desired business outcomes.

In an attempt to be as objective as possible, many evaluation processes will place a heavy weight on *data*: cost data, a partner's volume of customer references, average time-to-implement, and so forth. While this data is certainly important, it can't, by itself, provide an understanding of more subjective factors that determine if a partner is an optimal fit for your organization. The story told by data needs to be balanced with qualitative stories or anecdotes that indicate whether your partner is a right fit from a cultural or other perspective.

Best practice – Ask your partner to share anecdotes or case studies

These anecdotes or case studies can help you determine if the partner is a cultural fit for your organization and can meet your business needs. Here are a few examples:

- How the partner helped a similar organization (ideally, of the same industry and size) achieve its transformation vision
- Success stories about realizing business objectives and adoption through implementation efforts, ideally with the same ServiceNow products that you need them to implement for you
- Case studies on how the partner has built solid relationships with their customers by going above and beyond the call of duty
- Case studies that reflect how the partner has handled challenging situations, roadblocks, or organizational change management

EXPERT TIP

When you select a partner based principally on cost, you can end up with a partner that doesn't have the experience or incentives to design for your future—which means that you could ultimately pay more due to rework.

INSIGHT 3:**Vet partner stories with the executive sponsor and partner evaluation team**

Many organizations will use a scorecard to evaluate prospective partners and make selection decisions. But when you over rely on your scorecard, you end up ignoring more qualitative factors—and that can leave you with an incomplete picture of what a partner can offer.

While it can be relatively easy to capture objective data through a scorecarding process, it can be harder to evaluate the subjective data you've received from your candidates' case studies and anecdotes. So, you need to make sure you have an explicit, shared understanding of both the business need and the characteristics that constitute a good cultural fit for your organization.

Best practice – Find the story characteristics that fit your culture, business need, and transformation vision

Vet partner stories with your executive sponsor and senior stakeholders (from your partner evaluation team) to understand which story characteristics fit with your organization's culture, business need, and vision for transformation. Partner stories should contain signs or signals that will point to a clear understanding of your needs and the potential for a strong, collaborative relationship. To identify important signals from partner stories, ask these questions:

Do the partner stories...

- Reflect active listening and the ability to understand problems before identifying solutions?
- Indicate the value that partner staff place on strong relationships?
- Reflect a focus on getting the job done or on realizing business outcomes?
- Show an understanding of our transformation vision and desired business outcomes?
- Provide tangible evidence of experience with companies in my industry?
- Reflect commitment in the success of my organization?
- Reflect shared beliefs and values?

What to do next

When you evaluate your partners comprehensively, considering both quantitative and qualitative factors, you can make a clearer and more confident decision. Get ready to negotiate the final terms and contract, then onboard your partner to promote an effective start to your ServiceNow project.

Step 4 – Select and onboard your partner

KEY INSIGHTS

- When you create an onboarding plan for your new partner, collaborate with them so your partner understands what should be included based on prior experience.

Your evaluation should lead to your “best fit” partner, so negotiate your contract and start creating an onboarding plan that will get both you and your partner off on the right foot.

EXPERT TIP

When it's possible and appropriate, hold off on notifying other candidates from your short list after you select your preferred partner—wait until you feel comfortable that final negotiations with the selected partner are going well. Negotiations can fall apart quickly for unforeseen causes, so you may want to keep your short list available in the event your preferred partner fails to work out.

A well-defined partner onboarding plan sets the right expectations for your partner, and helps you establish clear management of your partner relationship.

To finalize selection and onboard your partner, complete these action steps:

1. Select a ServiceNow Implementation partner.

Make a final selection based on a thorough review of the final partner proposals and scorecard results. Ensure that your contract negotiations work toward mutual benefit for both you and your partner, and remove any ambiguity in your expectations or terms.

2. Onboard your partner and prepare your internal team for transition.

Define the roles and responsibilities between the partner and your internal team, and build a communication plan to educate your internal team. A clear onboarding plan helps reduce early problems and paves the way for a mutually beneficial partnership.

Customer insight

Keep this in mind as you select and onboard a partner.

INSIGHT:

Collaborate with your partner to build the onboarding plan

Your organization may have a standard process for onboarding a new vendor or partner. But you should ideally include partner inputs in the development of your onboarding plan to reduce the potential for errors or oversights that lengthen ramp-up time.

For example, if you don't give security or data access to your partner team in a timely manner, they might not even start the project, creating an immediate red flag in your project timeline.

Best practice – Ask your partner leads what they need for successful onboarding

Your partner will understand what should be part of the onboarding plan based on prior experience (access to data, for example). Your project manager can help you create and socialize the onboarding plan with the partner and your internal team and verify that all deliverables are included. See Table 1 for an example.

Deliverable	Priority	Status	Complete
Security and data access			
Network access	High	Green	75%
ServiceNow instance access			
Data access to legacy system			
Project kickoff			
Platform and partner team introductions			
Licensing bill of materials (BOM)			
Statement of work (SOW)			
ServiceNow product roadmap			
Implementation project charter			
Implementation project plan			
Key performance indicators (KPIs)			
Trading plan			
Project tools and methodologies			
Communication and planning tools (e.g., Slack, Skype)			
Project management methodology (e.g., Scrum, Agile, Kanban)			

Table 1: Sample ServiceNow partner onboarding plan

During the project kickoff with your partner, review the ServiceNow licenses your organization purchased and the partner SOW. Doing this gives both project teams transparency since not everyone was involved in the initial procurement process and since some resources may have changed since the partner evaluation that led up to the kickoff meeting.

Also, incorporate a licensing knowledge transfer both during your evaluation and post selection so you're all on track with licensing compliance, adoption, and consumption. Reviewing the SOW gives you clarity into the contractual project scope and avoids the need for a change order, which adds extra costs to the project.

What to do next

An effective onboarding plan should set the right tone and cadence for your ServiceNow project, and for your relationship with your partner. Effective, ongoing partner management processes are critical to sustaining this success, especially early in the relationship.

Continue to monitor the status of your onboarding plan, and revisit it as your ServiceNow implementation changes, as your partner team changes, as you stand up new projects with your partner, or as you need new deliverables.

Step 5 – Manage your partner

KEY INSIGHTS

- Start measuring your partner's performance immediately to ensure early problems don't lead to long-term failure.
- Include your partner in strategy governance to ensure they're delivering toward your vision for transformation.
- Assign a strong manager to the partner relationship. Set clear expectations for this role and for how you'll manage partner performance.

Selecting and onboarding your partner is just the start. It's critical to coordinate, measure, and manage the partner to ensure your ServiceNow implementation provides optimal value to your organization. The success of your partner relationship is not just a matter of making the right selection but of rigorous, ongoing management.

To manage your partner, complete these action steps:

1. Create a partner management scorecard.

This helps you monitor partner performance and provides a tool you can present as part of a performance dashboard to your executive sponsor and other key stakeholders.

2. Continually monitor partner performance.

Reviewing performance metrics periodically allows you to track contractual SLAs to keep the partner accountable and look for improvement opportunities to maximize your partner's value. Ensure that your metrics look at early indicators of potential project or relationship failure and not just outcomes.

3. Assign resources to manage the partner relationship.

Designate someone to own the relationship (such as an internal partner manager) and work in tandem with the project manager for the ServiceNow implementation.

4. Set up lines of communication to kick off and manage the partnership.

Conduct a joint kickoff meeting to launch the partnership, and conduct quarterly business reviews to review performance, address issues, and identify opportunities for innovation.

Customer insights

Customer experience points to three insights you should keep in mind as you manage your partner.

INSIGHT 1:

Measure and manage the partner's performance as early as possible

As soon as the contract is signed (and before, if possible), identify the key performance indicators (KPIs) and metrics that you'll use to assess your partner's performance. Early work

activities can be an ongoing indicator of partner effectiveness, but many organizations wait too long to begin measuring partner performance, and they miss the opportunity to make early interventions and corrections when they're needed.

Best practice – Start measuring partner performance immediately

To help your partner start off right (and to keep you from being blindsided by poor partner selection), ensure that performance measurement begins immediately.

Explicitly communicate how you'll measure performance, including thresholds for acceptable performance and KPIs that reflect the quality of the relationship as well as progress against deliverables. Weekly performance reviews should also begin immediately so you can surface opportunities for improvement and indicators of potential shortfalls. It's better to fail fast than wait too long to realize you don't have the right partner.

Work with your project management team to create a partner scorecard or status report that includes elements of partner performance with KPIs such as:

- % of track to go-live
- % of on-budget
- # of partner escalations
- % of assigned partner training complete
- Internal team survey of satisfaction with partner performance
- Product quality
- Value realized

Note: The project status report should cover the areas of people, process, and technology.

Some early indicators of potential project or relationship failure may include:

- **Partner staffing issues** – The partner's committed "A team" is not the same team working on your project, and poor performance is starting to show.
- **Timelines being stretched** – Implementation timelines aren't being met without concrete reasons.
- **Lack of partner executive sponsor engagement** – The partner's executive sponsor stops attending meetings or isn't helping with escalations when needed.

Be sure to remediate any issues with the partner immediately to avoid negative long-term effects to your ServiceNow project.

INSIGHT 2:

Include your partner in strategy governance

Not including partners in strategy governance from the start can cause strategic drift because your partner may lose a clear sense of roadmap priorities. Partners need the right guardrails and strategic direction to work directly with stakeholders (for example, your process owners)—those guardrails are best provided through your governance function. Sometimes, organizations tend to think the partner should take responsibility for governance once the project starts, but this isn't the case. Your organization needs to be active and always visible in governance.

Best practice – If you have governance in place, make sure you include partners from the start of the relationship

To prevent partners from engaging in activities that may not be scalable or sustainable, or that don't align with your transformation goals, include your partner in your strategy governance committee meetings, as well as in decisions involving your executive sponsor. Work with your executive sponsor to include your partner's perspectives in key strategy governance decisions. This will both inform those decisions and ensure that the partner's execution remains aligned to your vision and business objectives.

INSIGHT 3:

Select the right internal partner manager

Successful partner management requires the right skills and experience. Don't assign someone to manage the partner relationship who doesn't have the background, experience, or clear understanding of what's expected. This can prevent the partner from being successful at delivering on your business needs. Remember, in any partner relationship, effective outcomes are dependent on both how the partner executes and on how you manage the partner.

Best practice – Assign a strong partner manager

To ensure you have effective management for the partner relationship, ensure you assign a strong (and ideally experienced) manager. The partner manager should possess these key business skills to be successful:

- Conflict resolution
- Stakeholder alignment
- Managing performance
- Managing up, down, and sideways
- Harnessing diversity to capture innovation
- Influence without authority

Ensure your partner manager as well as your partner are clear on the roles and responsibilities of your partner manager so you set the right expectations for relationship management.

EXPERT TIP

Make sure you're mapping relationships and lines of communication between your organization and the partner. When problems happen, you want a clear escalation path to ensure the issues are addressed quickly and efficiently.

What to do next

If you're managing your partner effectively, your next step is to determine if your partner is delivering beyond expectations. If so, they can play a more strategic role in your implementation.

Be prepared to revisit and address the performance of both your partner manager and project manager as well as that of the partner team. You may need to remediate if your managers can't build a collaborative relationship, and you may need to ask for replacements on your partner's team if performance improvements are not happening within a reasonable time period.

Pay close attention to partner management across the lifecycle of your relationship. Monitor the relationship continuously and keep it fresh with new ideas for improvement and innovation from both sides.

Step 6 – Develop a strategic partner relationship

KEY INSIGHTS

- Be a “customer of choice” to get expanded value out of the partner.
- Provide access to the insights and resources your partner needs to deliver transformational value.
- Don't judge a partner by size or cost, but by how invested they are in your success.

All partnerships have some level of importance, including those that serve your day-to-day operational and transactional needs. But these aren't necessarily strategic to the transformation and long-term success of your organization.

Strategic partnerships help you identify opportunities for transformation and innovation beyond your initial business outcomes. In the best scenarios, a strategic partner is a co-creator of your vision for transformation.

To develop a strategic partner relationship, complete these action steps:

1. Identify whether your partner has demonstrated the characteristics needed to be a strategic partner.

Look at the partner's track record of meeting or exceeding SLAs, delivery of insights and support for digital transformation, and collaboration in identifying and capturing innovation opportunities.

2. Include the partner in strategic activities.

Provide your partner deeper insight into your organization by educating them on your company's vision, mission, and strategy. Also include your partner in the development of your roadmap, organizational change management process, and governance. This background and inclusion will help your partner bring more value to the relationship.

3. Jointly assess new opportunities with your partner.

Work with your partner to extend ServiceNow across your enterprise using demos, prototypes, and proofs of concept.

4. Run strategy insight days when using multiple partners.

Holding strategy insight days will help you get the most value out the combined experience and collaboration of your partners.

Customer insights

Customer experience points to two best practices you should keep in mind as you develop a strategic partner relationship.

INSIGHT 1:

Be a “customer of choice”

Strategic partnerships have to deliver benefit to the partner as well as to your organization. This means your partner has to perceive you as a strategic customer—or a customer of choice—as much as you perceive them as a strategic partner.

Don't overlook your own role in acting as a customer of choice for your strategic partner. Ask:

- Are we treating our partner as an extension of our organization?
- Are we giving them access to the insights and resources they need to deliver transformational guidance to our organization?
- Have we committed enough time and resources to the project and relationship?

Best practice – Demonstrate your investment in your partner relationship

Demonstrate your investment in your relationship with a potential strategic partner by:

- Remaining present and involved in the project, for example, by aiding and signing off on process design or redesign, or by signing off on requirements, etc.
- Sharing your corporate strategy
- Providing access to C-suite leaders for insight and collaboration on potential innovation opportunities
- Establishing joint ownership for intellectual property that may come out of the innovations you develop with your partner
- Staffing the project with your A team

EXPERT TIP

Don't let your partner perform only the work you ask for or communicate only what you want to hear. Address this behavior with the partner and ask them to speak candidly about their previous experiences and best practices to add value to the relationship.

INSIGHT 2:

Develop explicit criteria for determining a strategic partner

How do you know if you have a strategic partner? Many organizations equate “strategic partner” with their largest or highest cost partner. These aren't necessarily the best criteria for determining who should be considered strategic, and they may lead you to overlook hidden gems. The criteria you develop—which you should vet with your strategic governance function and executive sponsor—should not look at who the partner is but at how invested they are in your organization's success.

Best practice – Develop an explicit set of criteria for qualifying strategic partners

Use the list below to develop an explicit set of criteria for qualifying strategic partners that's focused on how invested they are in your organization's success. Seek out multiple perspectives, from front-line staff as well as project leaders, to determine whether your partner has provided consistent evidence of these qualifications. Conduct this evaluation at least once a year and remove any partner that doesn't meet these qualifications from your list of strategic partners.

Criteria of a strategic partner:

- The partner has provided A-team players on your project.
- The partner works with my team.
- The partner goes above and beyond on activities like training and support.
- The partner does not “nickel and dime” on project costs.
- The partner recognized and demonstrated genuine interest in my organization achieving business value.
- The partner has consistently delivered innovation and insight to support our business objectives.

What to do next

Answer these questions to guide you on your next steps:

- Do you have the ideal partner you set out to select?
- Is that partner a match for your transformation vision and desired business outcomes?
- If your selected partner is not a strategic partner, is the partner good enough for what your project needs, or do you need to consider alternatives?

The takeaway

Partners are critical to implementing and capturing value from ServiceNow. In addition to providing critical skills for technical deployment, partner organizations have access to a large knowledge base from previous engagements—successes and failures—to build better implementations.

Consider your partner as integral to how you actively drive transformation with ServiceNow. Don't treat partner relationships as transactional and contractual or as an afterthought. This can limit the value they can provide. Having partners participate in strategy development and governance increases their ability to provide the right constructive advice and improve the value you see in your ServiceNow implementation.

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

Good – You've selected a partner that completes your ServiceNow implementation on time, on budget, and according to plan with minimal issues.

Better – You've selected a partner that completes your ServiceNow implementation on time, on budget, to plan, and you've decided to build on your relationship to expand your ServiceNow roadmap.

Best – You've selected a strategic partner that helps your organization identify opportunities for transformation and innovation beyond your initial business outcomes.

What should I convey to my team?

The partner we select should be the best possible fit with our organization's business needs and culture. We need to use our partner's experience and knowledge to promote our business outcomes.

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

To determine if you are performing the actions in this Success Playbook effectively, measure these KPIs:

- *% of business value achieved* – Use the [ServiceNow Value Calculator](#) to determine what value you have achieved with the partner.
- *% on track and on budget to go-live* – Work with your project manager to track your go-live timeline and budget.
- *# of strategic partners identified* – You should ideally identify the potential for a strategic partner relationship after your first year of implementation.

Stakeholder management

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

Responsible/ accountable stakeholders

- CIO
- Executive sponsor
- Senior IT leadership
- Vendor management office
- Now Platform owner
- Procurement
- Legal

KEY COMMUNICATIONS

- Educate them on the partner strategy.
- Request their level of engagement (RACI).
- Provide progress reports on the status of the search and evaluation steps.
- Provide progress reports on the status of partnership post selection.
- Notify them of new partner engagement opportunities.

Consulted/informed stakeholders

- Development teams
- Service owners
- Governance boards
- Process owners
- Service desk staff
- Incident management teams

KEY COMMUNICATIONS

- Request their level of engagement (RACI).
- Inform them of the selection of your ServiceNow implementation partner.
- Request their input on your onboarding plan.
- Communicate the partner's role as an extension of our organization.
- Communicate the partner's responsibilities and accountabilities.
- Ask for ongoing feedback about the partner's performance.

Related resources

- [Success Checklist – Find, manage, and coordinate capable, certified partners](#)
- [Success Quick Answer – Find, manage, and coordinate capable, certified partners](#)
- [Webinar – Find, manage, and coordinate capable, certified partners](#)
- [ServiceNow Partners site](#)
- [ServiceNow Value Calculator](#)
- [ServiceNow Implementation Methodology](#)
- [Ten mistakes to avoid when working with tech partners](#)
- [7 Habits of Highly Successful Technology Partnerships](#)