

# Get started with Performance Analytics

**Improve performance by visualizing critical metrics and trends**

## What's in this Success Playbook

ServiceNow® Performance Analytics delivers real-time insight into business performance. It provides visibility into influential factors in each stage of your service to help you meet and exceed your goals. This Success Playbook will help you:

- Identify the metrics that matter for your business objectives
- Use out-of-the-box (OOTB) ServiceNow capabilities and content to address common measurement and reporting scenarios
- Use Performance Analytics to improve organizational decision-making

As a service or process owner, your operational performance has a direct and measurable impact on the executive-level goals of your organization. But all too often, approaches to analytics confuse rather than clarify effective decision-making. Read this playbook to help you bring clarity to your decision-making with the support of real-time and historical data and to avoid common pitfalls, such as the ones listed in Table 1.

| COMMON PITFALLS   | WHAT'S REALLY NEEDED   |
|---|--|
| Measuring everything and anything you can   | Metrics clearly connected to goals that matter for stakeholders                          |
| Displaying current values without context of time or operational targets            | Indicators of actions you can take right now to improve                                  |
| Static metrics that are only visible in a PowerPoint deck                           | Analytics within the workflow context, guiding daily actions and behavior                |
| Dashboards are overloaded with content and fail to provide decision-making guidance | Dashboards and visualizations designed to tell a clear story, tailored for audience need |

Table 1: Common analytics pitfalls

## Key takeaways

### The most important things to know

- Your indicators, dashboards, and breakdowns don't need to be perfectly configured before you begin using Performance Analytics. Developing and using an analytics solution is an ongoing and iterative process that you'll improve over time.
- Find time to regularly review your lagging and leading performance indicators to determine if they're still the most relevant or important metrics to monitor, based on your ability to make improvements to organizational decision-making.

### The payoff of getting this right

With the right analytics strategy and tools in place, you can ensure that teams are focused on the highest-impact work, improving efficiency and staff productivity.

## Playbook overview

Follow these steps to begin using Performance Analytics to improve your service levels:

| Step   |   | Outcome   |
|--|---|---|
| <b>Start</b><br>At the beginning, you'll build your initial or foundational capability. This includes setting up initial frameworks, defining roles, and clarifying your objectives. | <b>Step 1</b> – Determine what to measure and how                         | You've discussed the goal of the analytics project with all stakeholders, identified at least one process to measure, and documented the lagging and leading indicators for the process.  |
|  | <b>Step 2</b> – Activate Performance Analytics and out-of-the-box content | You've activated your Performance Analytics entitlement and the associated built-in content, confirmed the setup of timestamp fields, and possibly adjusted your indicator and breakdown source definitions.                      |
| <b>Improve</b><br>As you improve, you'll take steps that help you reach your objectives and see value fast.  | <b>Step 3</b> – Collect data and populate scores                          | You ran a historical data collection job, ran and scheduled a daily collection job, and used the logs to validate that the jobs ran successfully.   |
|  | <b>Step 4</b> – Explore, visualize, and then customize                    | You reviewed the indicators and scores, explored built-in dashboards, and possibly created a custom dashboard.  |
| <b>Optimize</b><br>Last, you'll refine and expand your capabilities so you can scale as you grow and continuously get more from using ServiceNow.                                    | <b>Step 5</b> – Use analytics to deliver improved service                 | You identified a multi-stage process to monitor with a workbench widget, applied in-form analytics to an existing form, started to use spotlight to prioritize your work, and set thresholds and targets for your key indicators. |

## Key insights

- Plan to get stakeholder alignment before building your dashboards.
- Start by using the built-in best practice dashboards and KPIs.
- Use historical and daily collection jobs to build snapshots of your performance.
- Use OOTB content to get a feel for your data and how to customize a dashboard.
- Empower everyone to take action with embedded, real-time analytics.

## Terms and definitions

**Analytics Hub** – An exploratory view of an indicator used for more detailed analysis. It lets you see trends, predictions, breakdowns, or associated records for a specific indicator.

**Breakdown** – Dimensions that show indicator scores across categories or buckets. Typically, you'll use a breakdown as a drilldown, filter, or slicer of the indicator scores to view results for something like incidents by priority or incidents by assignment group. The groups used for each breakdown are defined by breakdown sources—a set of records or a list within the instance.

**Dashboard** – A collection of widgets arranged in a logical view for the audience. A dashboard might be a combination of reports, indicators, breakdowns, and filters. Dashboards can include widgets specific to a single process or can span multiple processes to paint a bigger picture about overall performance.

**Data collector** – The engine that regularly collects scores and breakdowns from your application tables by taking periodic snapshots. Data collection jobs populate the Indicator Sources and Breakdown Sources tables that you can then use for analysis.

**Indicator** – A specific measurement you can count or calculate to assess process performance and forecast business trends. It might be called a key performance indicator (KPI) in other solutions. Each content pack installs the necessary data structures (indicator sources) to support daily measurements for your process, but you can always create additional indicators and indicator sources.

**Widget** – A defined and reusable view of an indicator that determines whether data is presented as a value, chart, or table. You can arrange widgets and place them on top of a dashboard canvas.

## Step 1 – Determine what to measure and how

### KEY INSIGHTS

- Identify what you'll measure—and how—before building dashboard visualizations.
- Get stakeholders aligned with your goals before proceeding.

Getting started with [Performance Analytics](#) is exciting, and you're going to want to jump in by building a dashboard full of rich visualizations. But don't jump in just yet! Simply seeing a visual of your data isn't going to create the change your organization is looking for.

Before you begin to build a single dashboard, you'll need to [define your organization's objectives](#) and be sure all stakeholders are aligned with those goals.

### Action Step 1: Discover your key metrics

ServiceNow provides many [indicators and dashboards out of the box](#), but you'll get the most value when you first consider the [key metrics](#) that best represent and measure how your process is performing. To discover these key metrics, ask a few basic questions, including:

- What are our strategic objectives for service management, and what do the executive stakeholders hope to change? For example, "Reduce IT spend by 10%."
- What processes affect this result and should be monitored? Select a process such as incident management or change management that has a strong influence on that strategic objective.
- What metrics should we use to track improvement? KPIs such as, "How long does it take to close an incident?" or "what percentage of incidents are resolved with my SLA commitments?" can be identified as key metrics.

Find the answers to these questions to ensure you have organizational alignment before continuing.

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#### EXPERT TIP

To save time, think about everyone—and their outcomes—who'll use the dashboards.

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### Action Step 2: Identify your lagging and leading indicators

Some metrics are great at representing how well a process is performing but can also feel difficult to influence or change on a daily basis. Performance Analytics shows you whether your scores are

improving or declining over time. It also identifies leading indicators—the factors that influence or predict the outcome metrics typically monitored by executives.

Two types of indicators are especially important as you think about how to measure your process:

- **Lagging indicators** – You'll typically use lagging indicators to determine success by looking at past performance, but they're naturally retrospective and difficult to influence on a day-to-day basis.
- **Leading indicators** – Leading indicators are more difficult to identify, but they measure the actions that ultimately influence the lagging indicators.

Here's an example of leading indicators related to the mean time to resolve (MTTR) of service requests:

| LAGGING INDICATOR    | LEADING INDICATOR                                 |
|----------------------|---|
| Mean time to resolve | % of P3 incidents not resolved within 48 hours    |
|                      | % of incidents resolved by first assignment group |

Table 2: Example of lagging and leading indicators

The relationship of the leading indicators provides advance notice about how the lagging indicator will be scored, so you can take action and positively affect the results. You'll have a hard time directly influencing the MTTR score, but you can absolutely adjust behavior to affect the percentage of P3 incidents not resolved within 48 hours or the percentage of incidents resolved by the first assignment group.

If you're having trouble following along, let's look at a person's weight as a great example of a lagging indicator. It might be how someone measures themselves on a daily or weekly basis to determine their fitness success (or failure), but it's naturally retrospective. Weight is considered a lagging indicator because there is no advance notice about how it will perform unless you track additional influencing factors such as diet and exercise.



Figure 1: How leading indicators affect a lagging indicator

The additional factors that influence a person's weight score are considered leading indicators because they can be monitored and adjusted to influence the next weight score. Let's look at two leading indicators for a weight score:

- **Duration of exercise** – Minimal exercise suggests that the weight score will increase, and increased exercise suggests that the weight score will decrease.
- **Calories consumed** – Consuming many calories in a day suggests that the weight score will increase, and consuming fewer suggests that the weight will decrease.

When you visualize these leading indicators alongside your weight score, you can track your progress in real time so you can take action to influence the lagging indicator. In other words, you can exert greater control over your next weight score by monitoring your exercise and calorie intake.

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#### EXPERT TIP

Make sure the indicators you select are actionable.

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A change in the indicator score should provide usable feedback about the performance of a process, group, or person. Start small with some of the default indicators and advance to more complex scenarios or custom calculations only as needed. It's easy to discover many interesting indicators but focus your time on those that will help improve your process.

## Checkpoint

Before you continue, make sure you:

- Discussed the goal of the analytics project with all stakeholders
- Can identify at least one process to measure
- Document the lagging and leading indicators for the process

## Step 2 – Understand and activate out-of-the-box content

### KEY INSIGHTS

- Activate Performance Analytics and ensure your account has the rights to manage its features.
- Get started with OOTB dashboards for common customer scenarios without customizing or building reports.

If you've been holding your excitement back, now is the time to release some of it as you begin to unlock functionality. But don't start customizing yet! Make sure you understand what's already available first. And keep in mind that the OOTB content will vary according to your ServiceNow release version and the version of Performance Analytics you purchased. Additionally, every ServiceNow instance comes with complementary Performance Analytics for Incident Management. This is a limited, non-customizable subset of Performance Analytics features that is entirely devoted to analyzing the incident management process.

Performance Analytics ships with the most common KPIs for measuring your IT, Customer Service, and HR service delivery processes to help you get started as quickly as possible. These KPIs are in content packs that create the visualizations on your screen using configuration items. Once the functionality is active, it only takes a few clicks to make your dashboards accessible to users.

### Action Step 1: Learn more about the Performance Analytics architecture

The Performance Analytics content packs contain preconfigured objects that allow you to start measuring your process, but it's important to understand what's under the hood so you feel comfortable making changes. The diagram below provides a visual of how the different Performance Analytics components interact.

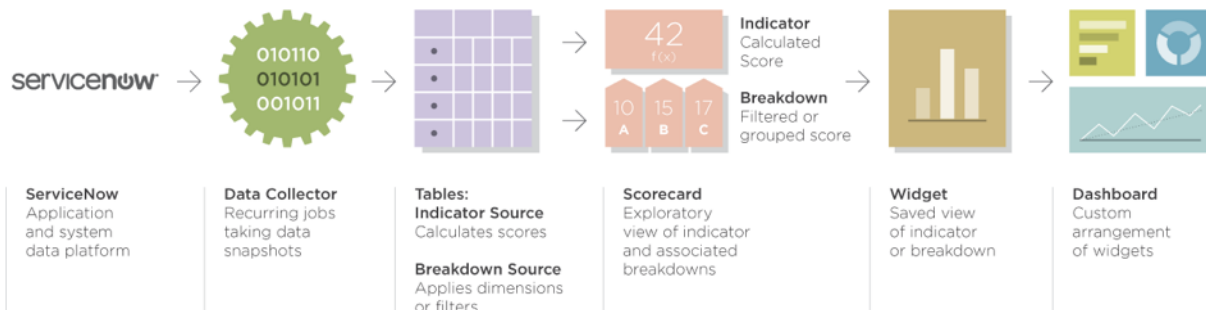


Figure 2: How ServiceNow Performance Analytics components interact

## Action Step 2: Activate Performance Analytics and out-of-the-box content

The activation process varies slightly based on the release version of your ServiceNow instance and the specific Performance Analytics SKU you purchased. For up-to-date activation instructions, visit the ServiceNow Community documentation for [Getting Started with Performance Analytics](#).

No matter which version you have, you or another user must have a user account with the admin role to your ServiceNow instance to complete the next few steps of the activation process.

## Action Step 3: Grant role permissions

After you have activated Performance Analytics and its built-in content, ensure your administrator has assigned the `pa_admin` role to a group that includes your user account if your role is limited. The `pa_admin` role allows you to configure the remaining aspects of Performance Analytics.

## Action Step 4: Confirm your default source fields

Performance Analytics makes some assumptions about the fields it can use to build trend information, namely from the default table fields used by each ServiceNow application. Given that, if you customize the timestamp fields used by a process, you must direct Performance Analytics to the correct fields for analyzing new, open, resolved, and closed records.

To view, create, and modify the [indicator source](#) definitions, navigate to **Performance Analytics > Sources > Indicator Sources**.

### Heads up!

Though it's unlikely, if your organization has modified the default fields used for a process, you can find instructions for updating each indicator source and the associated scripts in the ServiceNow Community documentation.

As it does with indicator sources, Performance Analytics also makes assumptions about [breakdown sources](#). These result in fairly long lists of breakdowns that may not apply to every process. For example, the breakdown source for groups populates a breakdown for all the active groups in an instance. Try viewing performance only by a subset of the groups that are related to a specific process.

To view, create, and modify the breakdown source definitions, navigate to **Performance Analytics > Sources > Breakdown Sources**.

## Additional resources

- [Getting Started With Performance Analytics](#) – ServiceNow Community documentation

## Checkpoint

Before you continue, make sure you:

- Understand the out-of-the-box content and architecture
- Activated your Performance Analytics entitlement
- Activated the associated built-in content for your Performance Analytics entitlement
- Have an account with the pa\_admin role
- Have confirmed whether the default timestamp fields for a process have been modified
- Adjusted the indicator source and breakdown source definitions, if necessary

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## Step 3 – Collect data and populate scores

### KEY INSIGHT

- To see your historical and daily process performance, run Performance Analytics data collection jobs.

Data collection jobs gather the indicator and breakdown data that will show up on your dashboards and in your widgets. This is what drives the snapshot nature of Performance Analytics data, so you can see how the measurements change day by day.

### Action Step 1: Run a historical data collection job

First, run the historical [data collection job](#) to assemble the scores for existing records up to the current date.

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#### EXPERT TIP

Only run historical jobs once per ServiceNow product upon initial configuration.

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Historical jobs are configured by default to run only on demand. Resist the urge to schedule or repeatedly run these jobs!

To start a historical data collection job:

1. Navigate to **Performance Analytics > Data Collector > Jobs**.
2. Click a job with "Historic" in the title to view its details.
3. Review the job details, especially the **Relative Start** field in the **Collection Parameters** section. Each of the historical data collection jobs are configured to retrieve up to 60 days of data by default. To adjust the amount of historical data collected, change **Operator** to **Fixed**. Then, increase or decrease the **Relative Start** value or set a specific date range by completing the **Fixed Start** and **Fixed End** fields.
4. Click **Update** to save your changes.
5. Click **Execute Now** to start the job. The duration of the job will vary depending on the record count in your ServiceNow instance.

**Scheduled Data Collection**  
[PA Incident] Historic Data Collection

Name: [PA Incident] Historic Data Collection Application: Global

Description: Performance Analytics Historic Data Collection for the limited edition set of indicators.  
Note that this job collects scores for multiple days. It is advised to collect only for a few days in one run depending on configuration.

**Collection parameters**  
Provide the score collection parameters. When collecting in the past do not go beyond the number of days that scores and snapshot data is retained, because scores and snapshot data is then removed automatically. See the Performance Analytics properties.

Operator: Relative  
Relative start: 60  
Relative end: 1  
Relative start interval: days ago  
Relative end interval: days ago

**Job parameters**  
Specify when to run the scheduled data collection job.

Run as: System Administrator  
Run as tz: System (America/Los\_Angeles)  
Active: ☐  
Run: On Demand  
Collect: Both scores and text index  
Conditional: ☐

Update Execute Now Cancel Job Delete

Figure 3: Starting a historical data collection job

## Action Step 2: Schedule a daily data collection job

After you run the historical data collection job, you must schedule daily or recurring data collection jobs. These jobs will update the Performance Analytics scores and snapshots daily, building on the data that the historical job already collected.

Set at least one of the daily data collection jobs to **Active** status before you move on to the next stage. Failure to set up a recurring data collection job will result in stale scores that only reflect your historical data. To monitor a process over time, you need to configure a daily data collection job.

To schedule a daily data collection job:

1. Navigate to **Performance Analytics > Data Collector > Jobs**.
2. Click a job with "Daily" in the title to view its details.
3. In the **Job Parameters** section, select the **Active** check box.
4. Check the **Time** field, which shows when the job will run. ServiceNow recommends setting the job to run shortly after midnight in the instance's time zone in order to collect a full day's worth of data.
5. Ensure the **Run As** field is set to a user role with rights to read the indicator source tables.
6. Click **Update** to save your changes.

**Scheduled Data Collection**  
[PA Incident] Daily Data Collection

Name: [PA Incident] Daily Data Collection  
Description: Performance Analytics Daily Data Collection for the limited edition set of indicators.  
Application: Global

**Collection parameters**  
Provide the score collection parameters. When collecting in the past do not go beyond the number of days that scores and snapshot data is retained, because scores and snapshot data is then removed automatically. See the Performance Analytics properties.

Operator: Relative  
Relative start: 1  
Relative end: 1  
Relative start interval: days ago  
Relative end interval: days ago

**Job parameters**  
Specify when to run the scheduled data collection job.

Run as: System Administrator  
Run as tz: System (America/Los\_Angeles)  
Active: ☒  
Run: Daily  
Collect: Both scores and text index  
Time: Hours 15, 00, 00  
Conditional: ☐

Update, Execute Now, Cancel Job, Delete

**Indicators**  
Search: for text

| Name  | Frequency | Indicator source | Active | Collect        |
|---|-----------|------------------|--------|----------------|
| Summed age of last update of open incidents | Daily     | Incidents.Open   | true   | All breakdowns |

Figure 4: Scheduling a daily data collection job in Performance Analytics

### Action Step 3: Validate the data collection job logs

The last step in the data collection stage is validating the log files to ensure that your historical and recurring jobs are running without any issues.

1. Navigate to **Performance Analytics > Data Collector > Job Logs**.
2. Scan the list of records. The **State** field for jobs that ran without any issues are marked as **Collected** with a green circle indicator.

| Created             | State     | Job                               | Inserts   | Warnings | Errors | Run time          |
|---------------------|-----------|-----------------------------------|-----------|----------|--------|-------------------|
| 2017-11-30 20:26:45 | Collected | ITSM Demo Data Collection         | 1,425,949 | 0        | 0      | 1 Hour 55 Minutes |
| 2017-11-30 20:15:41 | Collected | Incident SLA Demo Data Collection | 678,229   | 0        | 0      | 40 Minutes        |
| 2017-11-30 19:47:16 | Collected | CMDB Demo Data Collection         | 481,397   | 0        | 0      | 1 Hour 4 Minutes  |

Figure 5: Job logs in Performance Analytics

If the state of a job is marked as **Collecting**, the job is still in progress. Click the name of any completed job with data in the **Warnings** or **Errors** columns to receive a full report of actions taken and to investigate any problems. For help with any issues, see the [data collection process and logging documentation page](#).

## Checkpoint

Before you continue, make sure you:

- Ran a historical data collection job one time
- Ran and scheduled a daily data collection job
- Validated that the jobs ran successfully using the logs

## Step 4 – Explore, visualize, and then customize

### KEY INSIGHT

- Use the out-of-the-box content to get a feel for your data and how to [customize a dashboard](#).

Before customizing Performance Analytics, look at the dashboard visualizations you already have.

You can view your performance trend results as raw scores or through a wide range of visualizations, including [Analytics Hub](#) and dashboard widgets. You'll be able to expose specific views of an indicator using a widget on a dashboard. You can also explore an indicator by navigating directly to its Analytics Hub.

### Action Step 1: Review the indicators list

You can check the indicator's Analytics Hub after the historical and daily data collection jobs have run by following these steps:

1. Navigate to **Performance Analytics > Indicators > Automated Indicators**.
2. Click the title of any indicator to see a more detailed view of its indicator properties and description.
3. In the **Related Links** section, click **Show Analytics Hub** to explore the indicator scores over time or by a breakdown.

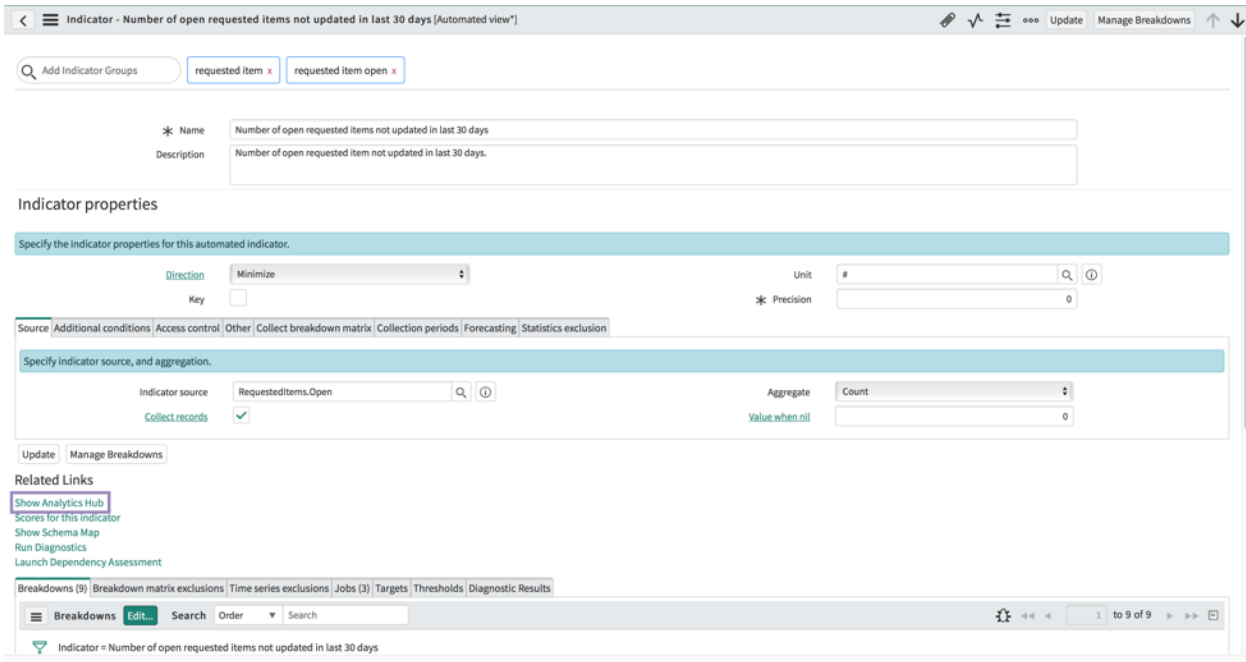


Figure 6: Checking the indicator Analytics Hub after a historical or daily run

## Action Step 2: Review indicator scores

When you click the **Show Analytics Hub** link in the previous step, you'll see the indicator detail view that shows the score over the time, breakdowns, and individual records that affected the indicator score, and additional information.



Figure 7: Reviewing indicator scores in Performance Analytics

The best practice for viewing and sharing results is using the Now Platform®. The Now Platform helps ensure that the data is always up to date and natively secured by the group and role assignments. You can export your indicator Analytics Hub content in formats such as PNG, JPEG, CSV, and PDF.

Spend some time examining the indicators to make sure that they're accurate according to your process.

### Action Step 3: Review built-in dashboards

The content packs you enabled previously create a number of dashboards that you can explore and use. To review these:

1. Navigate to **Performance Analytics > Dashboards**.
2. Select a dashboard, such as **Change Premium**, from the dropdown list at the top of the content pane.
3. View the dashboard widgets you see and click through the various tabs across the top of the screen.

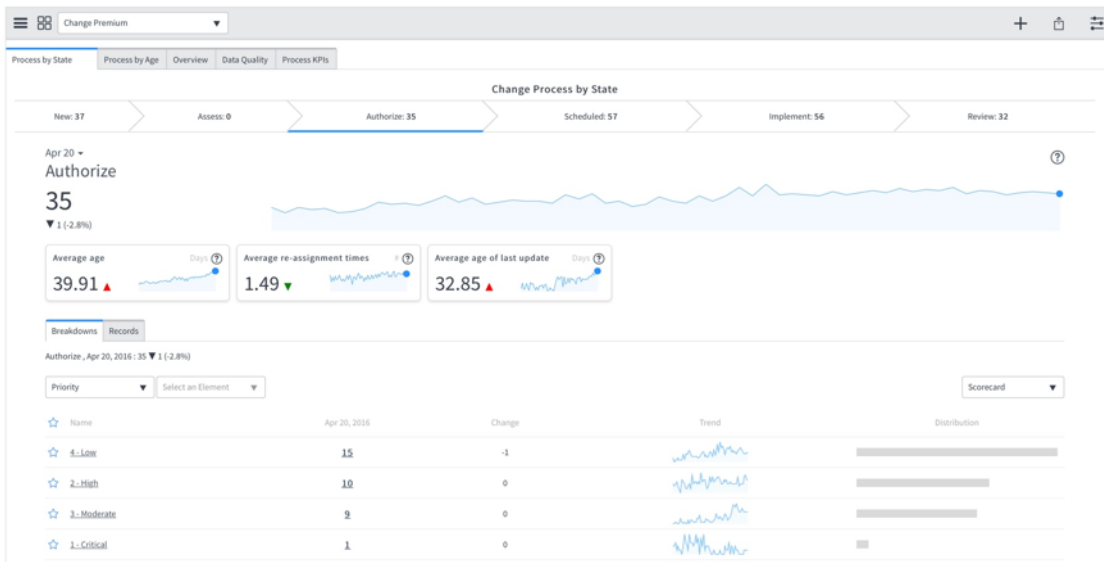


Figure 8: Built-in dashboards in Performance Analytics

#### EXPERT TIP

The out-of-the-box dashboard names correspond to the data collector job names.

### Action Step 4: Create a custom dashboard

If you'd like to add, remove, or adjust widget visualizations from the built-in dashboards, you can create your own. You can also duplicate an existing dashboard and make minor adjustments rather than start from scratch.

To modify an existing dashboard:

1. Navigate to **Performance Analytics > Dashboards**.
2. Select a dashboard from the drop-down list at the top of the content pane.
3. Click the **Additional Actions** button and select **Duplicate Dashboard**.

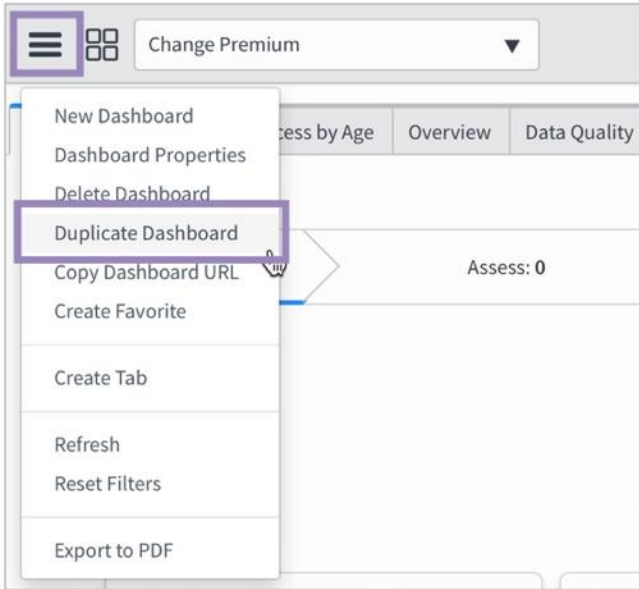


Figure 9: Modifying an existing dashboard in Performance Analytics

4. Confirm the action by clicking **Duplicate**.
5. Modify and customize the duplicated dashboard as needed. You can also select **Dashboard Properties** from the drop-down list to rename the duplicated dashboard.

To create a new, blank dashboard:

1. Navigate to **Performance Analytics > Dashboards**.
2. Click the **Additional Actions** button and select **New Dashboard**.
3. Enter a **Name** for the dashboard and select a **Group**.
4. If necessary, enter a value in the **Order** field to restrict the dashboard's visibility to specific roles.
5. Click **Submit**.

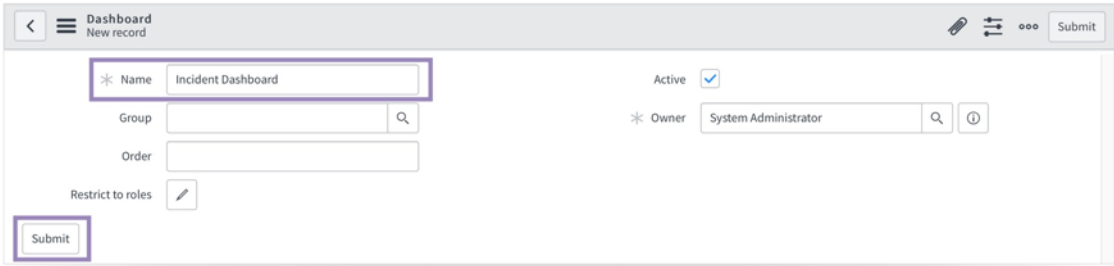


Figure 10: Creating a new, blank dashboard

### Action Step 5: Populate and organize a dashboard for a custom view

When you're using a dashboard, you can add, remove, and arrange individual widgets to create a custom view. Here's how:

1. Click the **Add Widgets** icon.
2. Select **Performance Analytics** from the drop-down list.
3. Select a **Breakdown**, **List**, **Pivot**, **Score**, **Text**, **Time Series**, or **Workbench** widget to add. Select **Score** as an example.

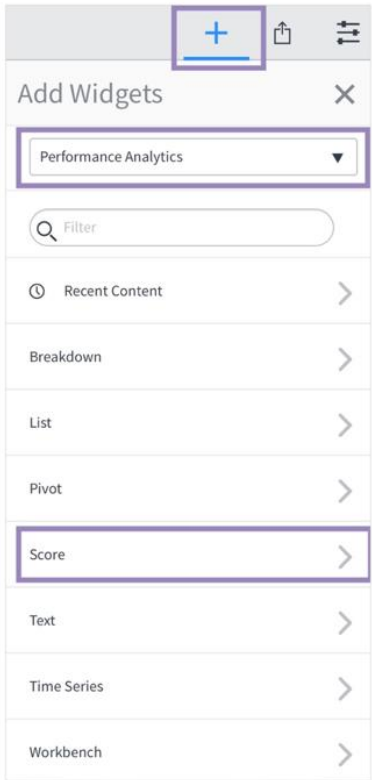


Figure 11: Adding widgets to a dashboard in Performance Analytics

4. Select an indicator that has been populated by a data collection job.

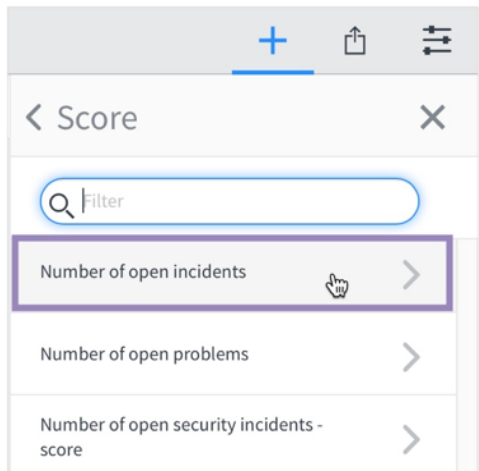


Figure 12: Selecting an indicator for a widget in Performance Analytics

5. Click the **Add** button to place the widget on the canvas after you ensure the preview looks acceptable.



Figure 13: Adding a widget to a dashboard in Performance Analytics

6. Click the **Close** icon to hide the **Add Widgets** panel.

Spend some time exploring additional widgets and organizing your dashboard. If you want to resize your widgets, click and drag the bottom corner. To move them, click and drag the title bar. Dashboards can also contain multiple tabs, each with independent widget arrangements.

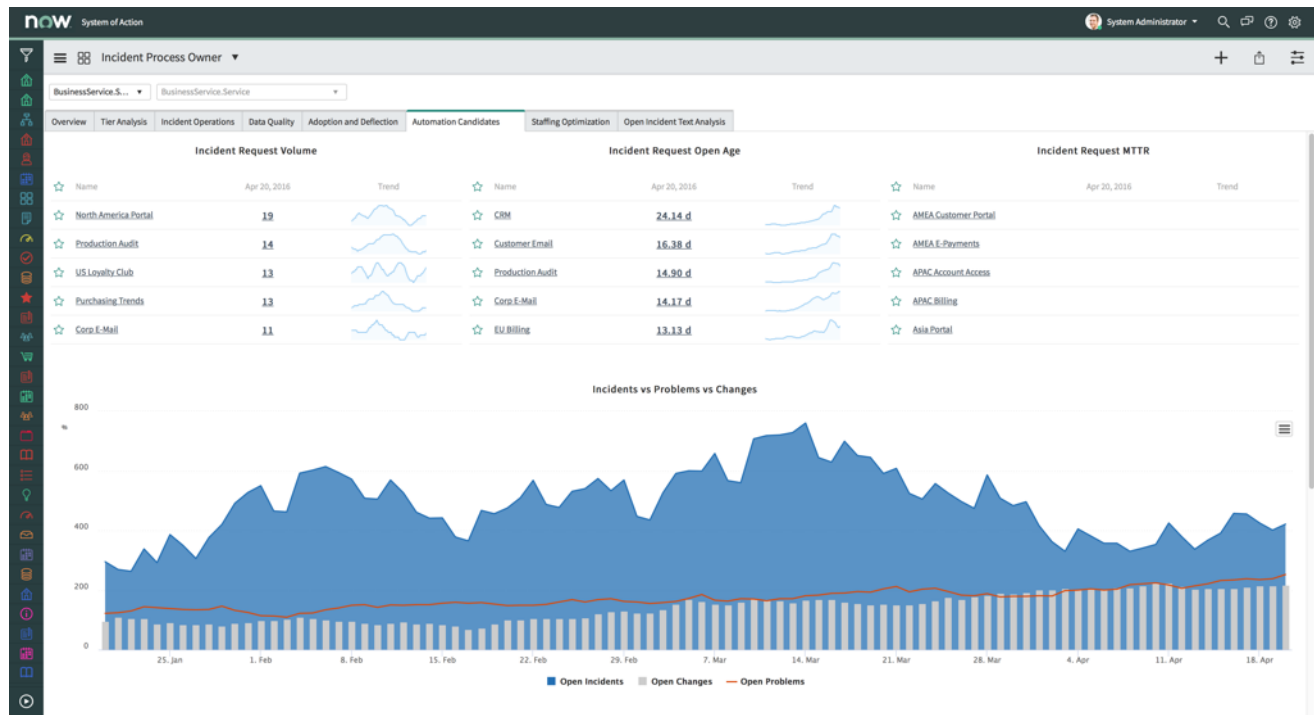


Figure 14: Customized Performance Analytics dashboard

## Checkpoint

Before you continue, make sure you:

- Reviewed the indicators and scores
- Explored the built-in dashboards
- Created a custom dashboard, if necessary

## Stage 5 – Use analytics to deliver improved service

### KEY INSIGHT

- Deliver GREAT service using the right visuals and key features of Performance Analytics.

Everything you've done so far is pretty impressive, right? But it's really just the tip of the Performance Analytics iceberg. Now it's time to deliver unprecedented levels of service by using the right visuals for your story and key features of Performance Analytics. Some of the features covered here—workbench process widgets, in-form analytics, and spotlights—are considered more of a next step or advanced capability, but we're planting the seed here because you'll want to explore those features after completing the basics.

### Action Step 1: Communicate effectively with the right visualization type

You can use indicator scores with almost any visualization or widget type, but you'll find it easier to communicate a story clearly when you select the most appropriate visualization type. This best practice includes guidance about how to use a few visuals, but you can also use the cheat sheet below for general advice. Before you select any visualization, you must understand the question you need to answer for your stakeholders—the “story” you want to convey to your audience.

| I WANT TO SHOW MY AUDIENCE            | VISUAL TO USE |
|---------------------------------------|---------------|
| Directionality or aggregate intervals | Single score  |
| Seasonality or correlation            | Time series   |
| Segmentation or proportion            | Breakdown     |

Table 3: Visualizations to use for specific stories

### Single score widget

You can use the single score widget to immediately communicate the value of a KPI (leading or lagging) because it packs a lot of information into a small space.

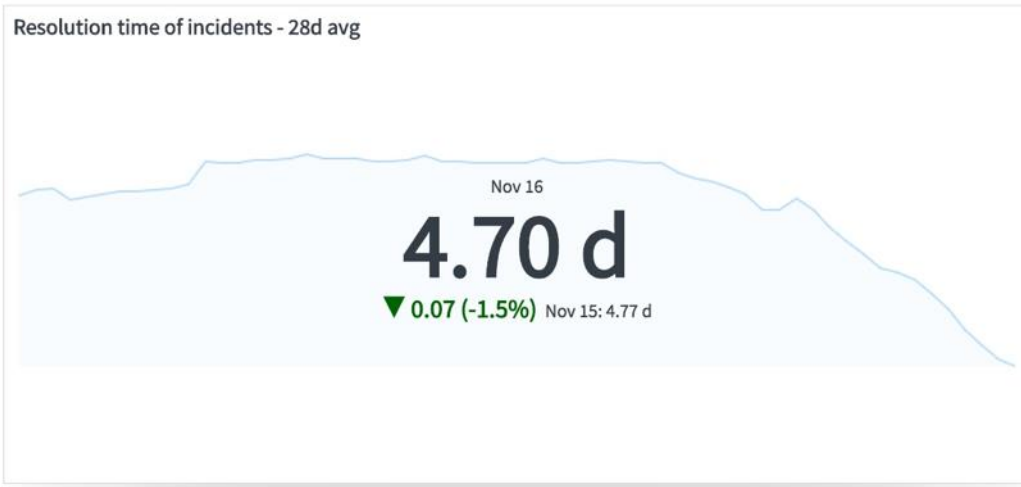


Figure 15: Single score widget

Use this widget to communicate these insights:

- **Directionality** – KPIs need to have targets and direction if they're going to work for your organization's goals. You can use the single score widget to show whether a KPI is showing an increase or decrease in performance compared to the previous period. In some cases, such as with MTTR, a decreasing value indicates positive change. You can set your indicator properties to show whether higher values represent a positive or negative change.
- **Aggregate intervals** – You can configure a single indicator to calculate the different aggregation periods that are tailored to separate audiences. One consumer might want to see a 28-day running average while another wants a monthly average. With the single score widget, you can select any aggregation and automatically smooth out the curve.

## Time series widget

The time series widget is a classic Performance Analytics widget that shows the trend of a KPI over time.

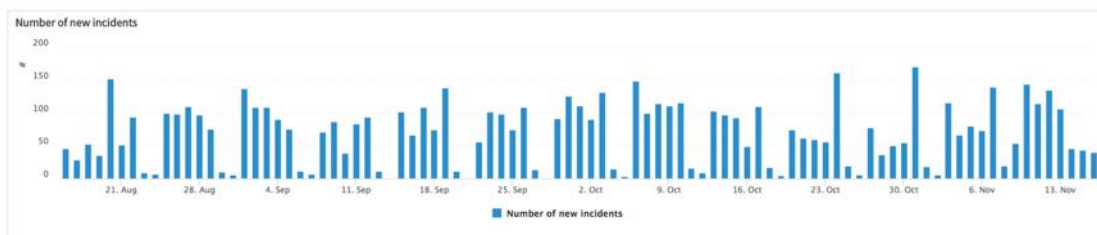


Figure 16: Time series widget

Use this widget to communicate or highlight these insights:

- **Seasonality** – Time series widgets are based on indicators that measure volume on a single day to assess frequency and distribution over time. These widgets help you expose recurring trends so you can plan ahead. For example, if Fridays historically have the heaviest intake of new requests, you might want to have additional staff on hand to process the increase in volume.
- **Correlation** – You can also use a time series widget to plot related KPIs on the same chart to drive visual correlations of trends.

#### EXPERT TIP

Be careful displaying two KPIs on the same chart! You only see potential interactions.

If you display two KPIs together on the same chart, you must understand the underlying process and desired outcomes before you draw any conclusions about the interactions.

## Breakdown widget

The breakdown widget adds a dimension of analysis to any visualization because it highlights the individual components of a value over a monolithic measurement.

Use the breakdown widget to communicate these insights:

- **Segmentation** – Using a breakdown widget provides insight into the specific elements that contribute to the KPI score. Breakdowns can be used to segment the data into different buckets or groups, so you can uncover bottlenecks or areas for improvement.
- **Proportion** – The breakdown widget is critical to showing proportional scores. You can compare how the different breakdown elements affect the overall indicator score over time by stacking or grouping the results.



Figure 17: Breakdown widget

## Action Step 2: Monitor a process with a workbench widget

The workbench widget helps your dashboards tell a story or monitor an end-to-end process through a collection of related indicators. Instead of using filters, breakdowns, and multiple tabs for a complex dashboard, a workbench widget shows leading and lagging indicator scores across different stages of a workflow with a single view.

You can build a workbench widget for indicators that have multiple states or that follow a discrete flow. These widgets will help you pinpoint where bottlenecks appear or where the performance begins to differ from the rest of the process.

A workbench widget contains the main, lagging indicator at the top with the supporting or leading indicators immediately below that score. The breakdowns for the indicator also appear within the same view, giving you a detailed view of an indicator over time. Each piece of the workbench widget dynamically updates as you explore the data, so you can scrub through a timeline and analyze the results. These features make your workbench widget an interactive tool that lets you proactively manage a process.

A common use case is to see how indicator scores for MTTR vary by Tier 1, 2, or 3 groups. While you could look at single score breakdown by tier, a workbench widget lets you view all the indicator trends and breakdowns by stepping through each tier. It packs a lot of functionality into a single screen!

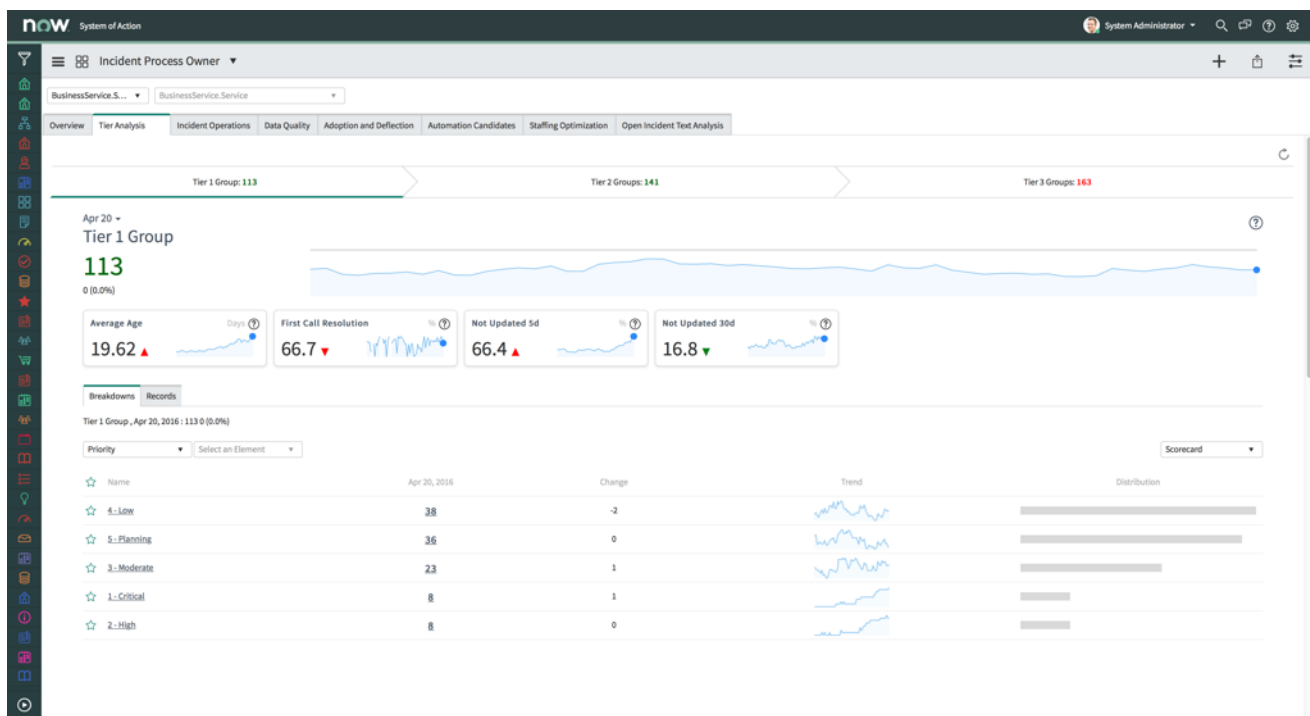


Figure 18: Workbench widget

You can create a workbench process widget by following the instructions in this [product document](#).

### Action Step 3: Enhance decision-making with in-form analytics

**In-form analytics** provide at-a-glance dashboard views within the context of an existing form. These analytics display contextual dashboards as users select options within a field, providing the best possible information for decision-making.

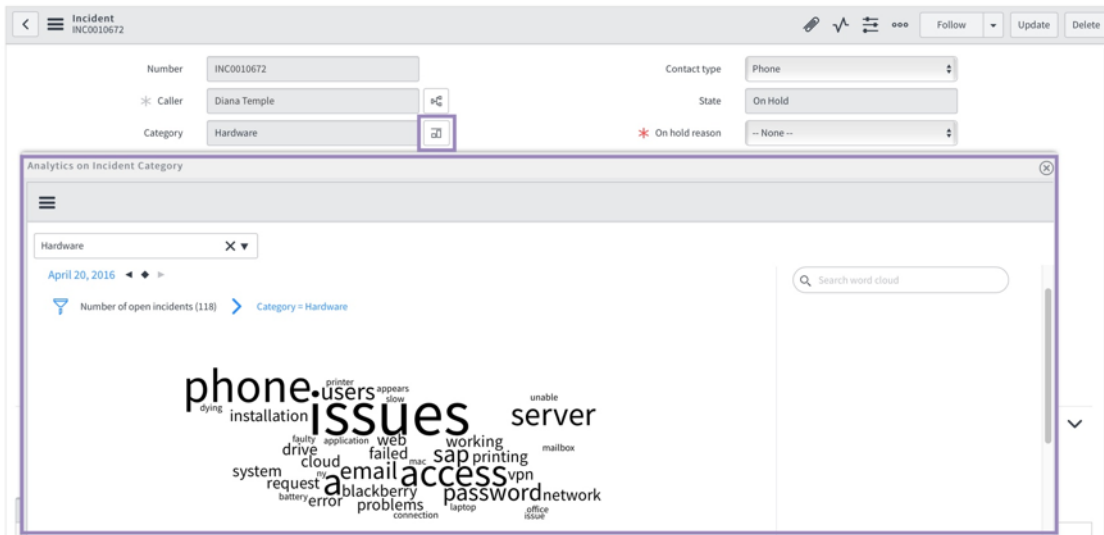


Figure 19: Text analytics embedded in an incident form

Think about the areas within a process that often require research or feedback and consider whether an indicator might be able to assist with that decision. Workers can use these insights to set customer expectations or route requests through the most efficient path without consulting another resource.

For example, it can be helpful to understand the backlog and MTTR for various teams to ensure that a new ticket is resolved as quickly as possible. Assigning an incident to a team with a significant backlog might negatively impact an SLA. In-form analytics allow someone to visualize that backlog in advance and route the request to a different team. An agent can also provide a real-time estimate on the expected resolution time of a particular ticket by simply clicking the in-form analytics button and seeing the resolution time trend for that type of incident.

You can create an in-form analytics control by following the instructions available in the [product documentation](#).

## Action Step 4: Use Spotlight to focus on high-impact work

**Spotlight** lets you prioritize work based on weighted or indexed criteria, so users can focus on tasks that have the most impact on an indicator. Most organizations prioritize cases with the highest severity level. For some situations, though, it makes sense to prioritize incidents differently. Incidents that have been open for many days or that have been reassigned multiple times might cause an SLA breach. Spotlight lets you highlight those considerations when prioritizing work.

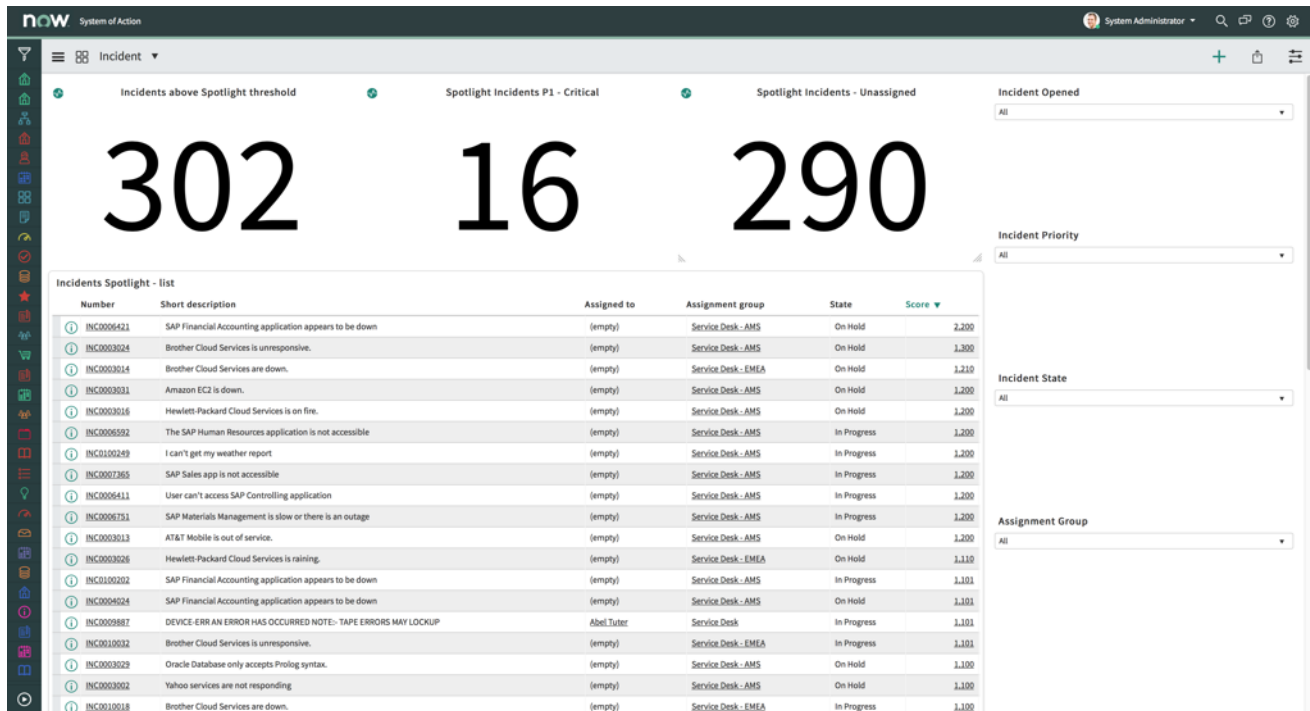


Figure 20: Using spotlight to focus on high-impact issues

You can place spotlight data on any dashboard, but a common use case is to provide front-line workers with a view that combines spotlight metrics and a list of affected records. Front-line workers can use this dashboard to see records in real time and understand exactly where to focus their efforts for the biggest impact on service levels. Instead of clicking through multiple records and making a subjective guess at which record is most important to work on next, Spotlight clearly provides that information.

You can begin using Spotlight by following the detailed instructions available in the [product documentation](#).

## Action Step 5: Build targets and set thresholds

Once you've identified the KPIs to monitor, you can [define service targets and begin setting alert thresholds](#). If you don't have a goal or target value for an indicator, it's probably not worth following.

- **Targets** – Targets let you monitor your progress toward a specific score for an indicator. As an organization or [process owner](#), you can set a goal for an indicator and view that target in Analytics Hub.
- **Thresholds** – Thresholds alert you when indicator scores fall above or below a specific value. You can also configure an alert for an all-time high or low score.

Use targets to stay focused on a goal and thresholds to minimize surprises. A threshold alert set on leading indicators can bring your attention to an abnormal value and give you time to address the issue before it negatively impacts a lagging indicator.

To create a target:

1. Navigate to the **Analytics Hub** for an indicator.
2. Click a data point on the visual to set an initial start date for monitoring progress toward the target.
3. Click the **Add/Change a Target** icon the upper right corner.
4. Enter a target value in the **Target starting from...** field and select whether to make it a **Global** or **Personal** target.
5. Click **Save**.

System Administrator

Global ☒ Personal ☐

Target

.90

Date

Apr 19, 2016

Figure 21: Creating a target for your KPIs

### Heads up!

Anyone can view global targets, but you must configure their notifications separately. When you create a personal target, only you can see it, and notifications are automatic.

To add a threshold:

1. Navigate to the **Analytics Hub** for an indicator.
2. In the upper right corner, click the **Add/Change a Threshold** icon.
3. Select the condition that triggers the threshold notification, such as when the score reaches an all-time high, or when the score falls lower than a specific value.
4. Click **Save**.

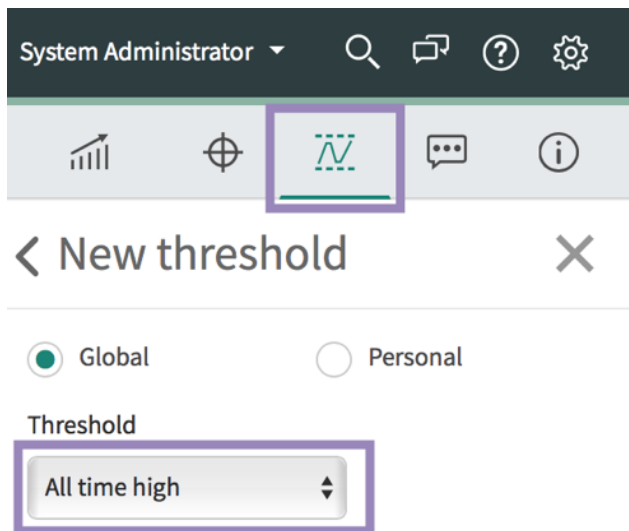


Figure 22: Adding a threshold

## Action Step 6: Customize as needed

Out-of-the-box content can get you up and running with amazing efficiency, but there is no one-stop shop for every business and process. That's why the Now Platform lets you customize Performance Analytics to meet your specific needs. If you'd like additional assistance with planning, implementing, or managing Performance Analytics, please contact your ServiceNow account representative.

## Checkpoint

Before you continue, make sure you:

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- Understand when to use the basic widget types
  - Identified a multi-stage process to monitor with a workbench widget
  - Selected an existing form that would benefit from contextual in-form analytics
  - Recognize how to use spotlight to prioritize your work
  - Set thresholds and targets for your key indicators

## The takeaway

After setting up and configuring Performance Analytics, be sure to use the solution regularly to improve your processes. This follow-up is vital to your initial efforts. Set a schedule for yourself and other stakeholders to regularly review this data.

Don't stress about making sure your indicators, dashboards, and breakdowns are perfectly configured before you begin using the platform. Developing and using an analytics solution is an ongoing and iterative process that you'll improve over time. Each insight tends to provide additional data points, so follow the trail and discover new ways to view your data and improve your processes.

Find time to regularly review your lagging and leading indicators to determine if they're still the most relevant or important metrics to monitor. There may be some indicators you remove from views or new indicators you define that give you a better view of your process performance. Either way, expect to continuously tune and adjust your Performance Analytics configuration to maximize the value of the platform.

## Appendix

### Related resources

- [Getting Started with Performance Analytics](#) – ServiceNow Community
- [Performance Analytics](#) – Product Docs
- [To Maximize the Value of Your Data – Have a Conversation with It](#) – ServiceNow Community blog
- [Outcome-Based Dashboard Design](#) – ServiceNow Community blog