

Consolidate your ServiceNow production instances

What's in this Success Playbook

This Success Playbook will guide you through critical business considerations and actions required to consolidate your ServiceNow® production instances into one system of action. It will help you answer the following questions:

- What are my options for consolidating my instance footprint? How do I choose the right option for my organization?
- How do I organize, plan, and execute the work required to consolidate my instances?
- How do I go about designing platform configuration on a consolidated footprint?
- What should I consider when I integrate two teams on a consolidated instance?

Key takeaways

The most important things to know

In the absence of regulatory or other business requirements for data or process separation, most organizations should opt for a consolidated instance footprint to support visibility across workflows and minimize technical debt.

Take the opportunity afforded by consolidation to clarify your ServiceNow reference architecture and roadmap.

Shape your consolidation program to include only those stakeholders—typically process and service owners—required to configure consolidated processes, data models, and services. Don't let the work of the consolidation prevent you from keeping the lights on. Make sure you have resources who can continue to meet the daily demands of your business and customers.

Prioritize user engagement throughout your consolidation journey. Consolidation may lead to significant change for process users and end users. Empower your users by giving them a voice in the workflow design of your consolidated instance.

The payoff of getting this right

Instance consolidation is an opportunity to reduce customization and technical debt, create efficiencies, and rebrand your ServiceNow team, so you can accelerate your business outcomes.

You'll be able to operate one system of action, so you'll have insight—and be able to scale—across digital workflows.

In the end, you'll likely reduce your costs for maintaining your production instance because of the efficiencies you gained from combining two or more systems, operating models, and support teams.

What you need to get started

Support from your executive sponsor and/or CIO for instance consolidation and defining your desired business outcomes.

A PMO function or role, either internal or external, that will track and coordinate the activities in the instance consolidation program.

When you should start this activity

Start this activity as soon as you become aware of a change in the business that will require you to consolidate one or more ServiceNow instances with a legacy system. For example, if your leadership team informs you of a merger or acquisition, start aligning your ServiceNow ecosystem to that activity as soon as possible. You may also advocate for instance consolidation as a means to drive greater consistency across enterprise workflows.

Playbook overview

ServiceNow recommends four steps to consolidating your production instances. While you should complete step one first, steps two through four include items that can/should be completed in parallel.

Step	Outcome	
Start At the beginning, you'll build your initial or foundational capability. This includes setting up initial frameworks, defining roles, and clarifying your objectives.	Step 1 – Decide on your consolidation approach	You have a clear reference architecture for your consolidated instance footprint that's aligned with your organization's consolidation use case, constraints, and broader business goals. You've created the governance structure and have the necessary resources to meet your consolidation goals.
Improve As you improve, you'll take steps that help you reach your objectives and see value fast.	Step 2 – Build your consolidation plan	You have a comprehensive program management plan and workstreams that enable your consolidation efforts. You have a plan to decommission existing systems and data.
	Step 3 – Design your consolidated processes, data model, and services	You've created design documents for your consolidated instance to use to configure your processes, data model, and services.
	Step 4 – Integrate your teams and prepare for go-live	You've consolidated your platform support teams and onboarded new users. Team members understand their roles and how to work with each other, and your initial business outcomes have been realized or you've defined the next steps required to achieve them.

Note: Steps 2–4 focus on the actions you should take if you consolidate instances, either through the “assimilate” or “Greenfield” options described in Step 1. If you elect instead to connect multiple instances through eBonding, see the [ServiceNow Product Documentation](#) for information on the ServiceNow eBonding spoke, as well as [this lab available on our Developer Portal](#).

Where you should start in this document

If you're not sure about your overall business objectives, what your options for consolidation are, or what you need to do to lay the groundwork for the consolidation, start with [Step 1](#).

If you understand your high-level consolidation strategy but don't have a plan to execute on the program, start with [Step 2](#).

If you understand your future state architecture and how you'll get there but don't have a good sense for process, data, and/or service configuration and design, start with [Step 3](#).

If you've completed most of the tactical consolidation work but need help understanding how to integrate teams and prepare them for go-live, start with [Step 4](#).

Terms and definitions

Agile software development – An iterative approach to software development that stresses cross-functional collaboration and organization designed to allow flexibility and a rapid response to change

Application rationalization – The strategic process of evaluating which applications should be kept, replaced, retired, or consolidated to improve business operations

Backlog grooming – The process of reviewing user stories in Agile development and determining the relative priority and in which sprint they'll be developed

Chain of custody – A concept that makes sure that data has not been altered from its original source after it's been migrated elsewhere

Change impact assessment – An assessment of a specific change, including who it will affect, when it will affect them, and what the scale and impact of the change is

Data lake – A centralized storage repository that uses a flat architecture to hold vast amounts of raw, unprocessed data

Data warehouse – A centralized storage repository that uses a hierarchical architecture to hold primarily processed data fed from multiple sources

Managed service provider – A company that remotely manages a customer's IT and/or other end user systems

Operating model – A model for how an organization completes work internally and how it delivers value to its customers

Project management office (PMO) – An individual, group, or department that oversees the various project management and coordination aspects of a large-scale project or program

Sprint – A specific development iteration within the Agile methodology during which specific planned work is completed

Story points – Point values assigned to each user story that indicate the relative effort required to fully complete the story

User acceptance testing (UAT) – The final testing phase, completed by end users, which is designed to get validation that the platform has been set up correctly to meet business outcomes

User story – A natural language description of specific demand for a software system that generally encompasses the impacted persona(s), specific action, and the value proposition

Step 1 – Decide on your consolidation approach

KEY INSIGHTS

- Identify opportunities for workflow improvement and process innovation as you plan your consolidation.
- Evaluate the health and maturity of your existing production instances before you decide on your future instance footprint.
- Map your desired ServiceNow architecture across your technology stack to serve as your north star for your analysis of your instance footprint.
- Consolidate existing governance resources to support your consolidation and long-term stabilization.

Begin to consolidate by translating your use case for consolidation into a target-state instance footprint. There are a few common use cases for consolidating your instances:

- **Support for mergers and acquisitions (M&A)** – You're about to acquire or merge with a company, or you have just been acquired. In this case, it's possible that both companies have ServiceNow instances, or one organization may be using ServiceNow while the other is using a different system. You'll likely have a specific date by which your two companies are expected to be fully integrated, which will drive your overall consolidation timeline.
- **Consolidating workflows across multiple lines of business** – Your organization currently has multiple production instances supporting different lines of business or services that you provide.
- **Managed service provider (MSP)** – You're an MSP and have multiple production instances to serve your customers either by the type of services you provide or because of your operating model.
- **Consolidating workflows across geographies** – You have more than one production instance to support different geographies in your organization.

Your consolidation use case will have specific business objectives that will help you decide on your approach to instance consolidation. Before you start the tactical work of marrying your instances, you need to determine whether you'll assimilate one instance into another, start from scratch with a brand-new instance (i.e., go "Greenfield"), or configure your instances to exchange data with each other via eBonding. Each of these options carries

implications for resourcing and your operating model, which you need to understand before you build your consolidation blueprint.

Complete these action steps.

Action Step 1: Identify the business goals and constraints of your use case to determine your consolidation approach

The scope and velocity of your consolidation program will be directly related to the business outcomes and constraints of your specific use case.

Start by working with your executive sponsor to define the strategic objectives the business wants to capture through consolidation. Distill these into one to three outcomes per objective that you can realize with ServiceNow. These outcomes will guide the consolidation program and should be concrete and measurable: You should be able to define key performance indicators (KPIs) to measure the success of your program in realizing your outcomes.

Next, partner with your executive sponsor to surface any constraints for the consolidation program. The scope of your program and your ability to realize outcomes will depend on limiting factors, such as timelines or available resources. Consider these questions in your conversation with your sponsor:

- Does the instance consolidation work need to be completed by the date a merger (or other business activity) is completed?
- How will the size of your process and end user population change?
- Will you have any additional resources to complete the consolidation work in addition to running day-to-day operations?
- Are there ServiceNow capabilities that you must have to meet any new or changing industry requirements?
- What type of access will you give to key stakeholders? To what extent will they be involved?

Your constraints should help you shape and prioritize your outcomes and KPIs. Once you finalize your constraints, make sure the outcomes for your consolidation program are SMART (specific, measurable, attainable, realistic, and time bound) and that they inform your resourcing requirements. Make sure to define a threshold for what constitutes success in your KPIs.

See Table 1 for an abbreviated example of the strategic objectives and outcomes that you can measure through KPIs. Start by defining SMART outcomes that reflect the strategic objective. Then, design KPIs that will inform whether you realized success. Based on this, you

can prioritize work in the consolidation program and estimate where you may need more resources.

Strategic objectives	Desired outcomes	Key performance indicators
Improve the user experience for end users, process users, and new hires.	<ul style="list-style-type: none"> • Increase adoption of self-service and chat channels within six months of consolidation. • Improve the length of the employee onboarding experience within three months of consolidation. 	<ul style="list-style-type: none"> • Reduce incident volume by 10% • Reduce the average time to onboard a new hire by 30 minutes
Drive efficiency with operational excellence.	<ul style="list-style-type: none"> • Automate repetitive help desk requests to improve productivity within six months of consolidation. • All CMDB configuration CIs are verified as accurate during the consolidation. 	<ul style="list-style-type: none"> • Reduce response and resolution times by 15% • Less than 1% of CIs require clean up in the quarter following consolidation
Reduce costs to maintain the platform.	<ul style="list-style-type: none"> • Eliminate staffing redundancies on the platform team within one year of consolidation. • Reduce the overall number of customizations during the consolidation. 	<ul style="list-style-type: none"> • Reduce labor costs on the platform team by 5% • Reduce customizations by 25%

Table 1: Strategic objectives from a consolidation use case distilled into desired outcomes and corresponding KPIs (abbreviated for illustration)

Make sure that your executive sponsor and other key stakeholders are aligned with your objectives, outcomes, and KPIs, and frequently communicate them during the consolidation program to assess whether you're on or off track. Critically, your outcomes and KPIs should guide where you focus effort when you configure processes, data models, and services (Step 3) for your consolidated instance – and should help broker any conflicts between teams over “best” configuration.

“Sometimes you absolutely need to get senior leadership involved to tell the right story and get benefit. It takes alignment with leadership's vision and direction and really trying to lean into the value proposition behind it and why it is better. And get stakeholder advocates to share their journey and why it has been a better solution.”

– A Fortune 500 ServiceNow customer

INSIGHT 1:

Identify opportunities for workflow improvement and process innovation as you plan your consolidation

Don't focus exclusively on marrying your instances as you consolidate. Consolidation is a perfect time to evaluate other opportunities to capture value since you already have your stakeholders' attention and will likely have resources dedicated to both consolidation work and organizational change management (OCM).

Customers who have recently gone through a consolidation effort identified two best practices.

Best practice

Conduct a workshop with your stakeholders to identify additional areas of opportunity and innovation. Gather your stakeholders to determine where you can use your consolidation program to resolve other pain points for the business, or realize additional value (e.g., eliminating technical debt, or implementing new capabilities). Your discussion should not only include opportunities to improve or introduce new ServiceNow capabilities, but should extend into opportunities to improve governance, user experience, and adoption. Make sure to include ServiceNow program and project sponsors, key IT decision makers, process owners, service owners, and any champions or leaders from IT and other business units. If you engage a transformation partner (see below) or ServiceNow for consolidation, consider including them in the workshop.

Your workshop should result in a list of potential opportunities, which you will then need to prioritize, keeping in mind the constraints of your use case. Based on input from key stakeholders, ServiceNow, and/or a partner, assign a value and effort score to each opportunity on your list. With these documented, plot your opportunities on a 2x2 matrix of value vs. effort to identify "low-hanging fruit" that might be worth pursuing as part of your consolidation program. Revisit this list periodically during the consolidation program to see if there is room to pull in opportunities you didn't initially commit to developing.

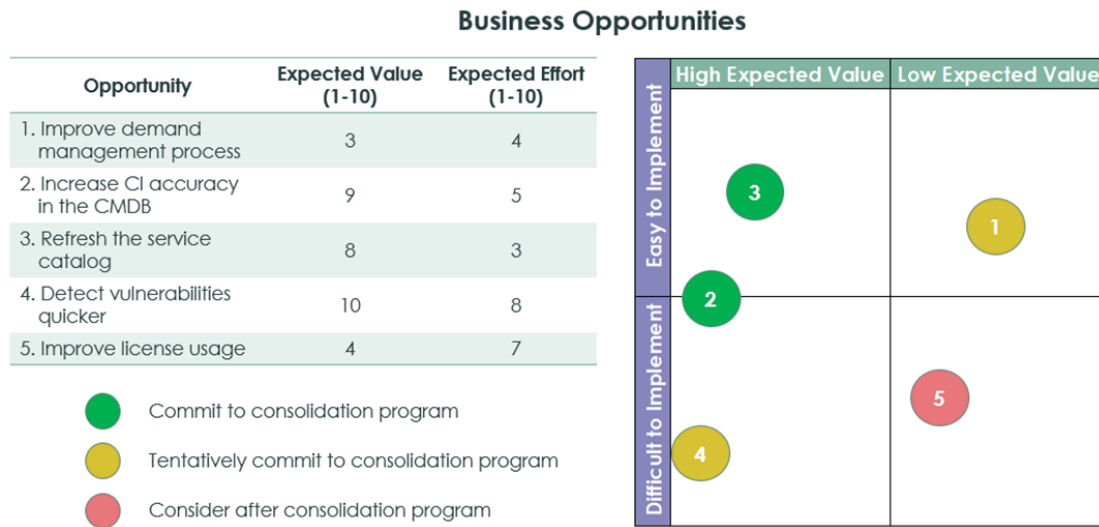


Figure 1: Additional business opportunities plotted on a 2x2 of expected value and expected effort (for illustrative purposes only)

Note: ServiceNow offers a [Business Alignment Workshop](#) to help you prioritize improvement opportunities, show how to achieve value from ServiceNow, and help you make sure the foundations are in place to launch your consolidation program.

Best practice

Bring on a qualified partner. A strong partner will be able to evaluate and identify improvement opportunities in your technology architecture and management activities, such as organizational change management. Additionally, a partner can help translate your strategic objectives (both tied to your consolidation use case and outside of it) into tangible ServiceNow capabilities. Depending on your needs and what the partner offers, consider using a partner to fulfill program/project management tasks, help you design effective governance for consolidation, and complete the technical and configuration work needed for consolidation.

Consider three key components in identifying a partner:

- **Technological prowess:** Instance consolidation comes down to understanding ServiceNow capabilities and how they help you deliver your strategic goals. A strong partner should understand Now Platform® architecture and how to align workflows to your strategic objectives.
- **Program management competencies:** Most customers expect partners to play a role in coordinating cross-functional teams, workstreams, and user focus groups to support consolidation. Your partner should have a strong PMO offering and the demonstrated ability to run complex programs.

- **Organizational change management practices:** Instance consolidation can bring many changes to your organization, including process and role changes as well as the way technology is used. Your partner should have strong change management practices to help you manage change in your organization.

Note: ServiceNow does not certify partners in instance consolidation specifically though there are partners that specialize in this space (e.g., global system integrators). Select a partner that is qualified and certified in the areas of the platform that you're consolidating. For more information on finding a certified partner, check out [Find, manage, and coordinate capable, certified partners](#) on the Customer Success Center and our [partner webpage](#).

Action Step 2: Decide on your future instance footprint

Now that you have clarity on your objectives, you are ready to consider your options for consolidating your instances. Your consolidation use case and objectives should enable you to define your future instance footprint and will direct the work that your team will need to take on for consolidation.

At a high level, there are four scenarios for instance consolidation, as illustrated in Figure 2:

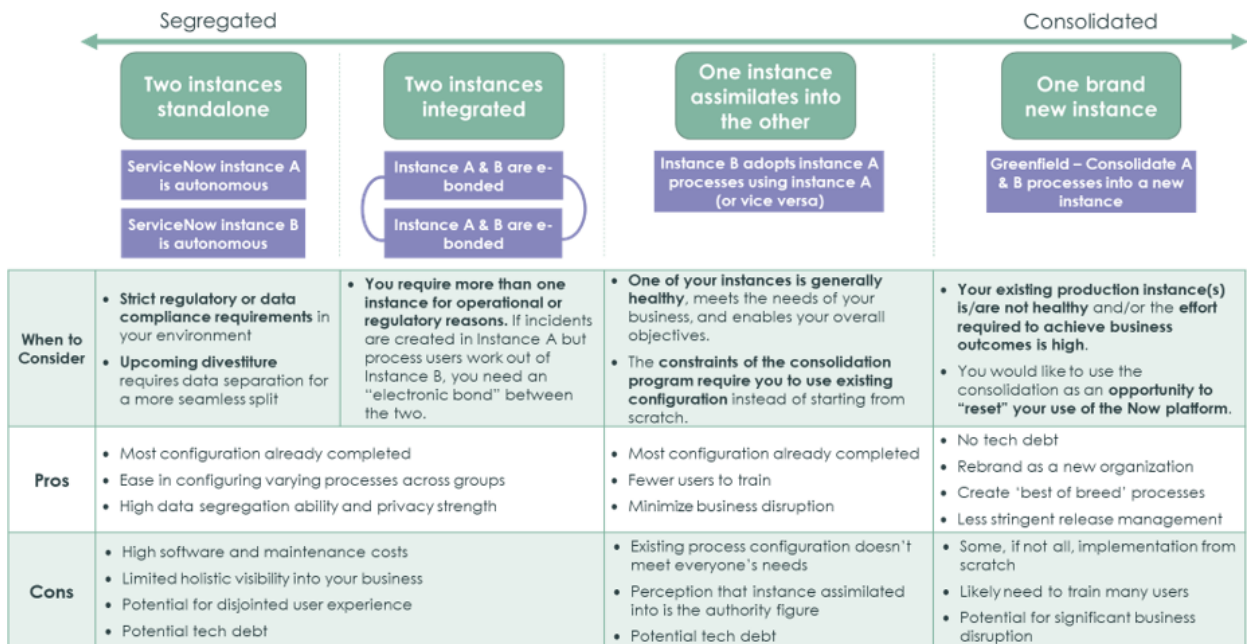


Figure 2: Scenarios for instance consolidation with pros and cons

Generally, the fewer production instances you have, the better: in most cases, unless you have business requirements (e.g., compliance requirements) for multiple instances, you should either assimilate into a single instance, or consolidate on a new, Greenfield instance.

This not only incurs lower costs for licenses, maintenance, etc., but enables you to have a holistic view of your digital workflows. More importantly, it enables a single system of action for your process users and end users. Each of these scenarios has pros and cons which are important to assess relative to the goals and constraints of your consolidation use case.

Start by referencing the decision tree in Figure 3, below, to home in on the instance scenario that makes the most sense for your organization. If you are between “assimilating” or “going Greenfield” on a single instance, consider the pros and cons for these consolidation scenarios in Figure 2 above as you make your decision.

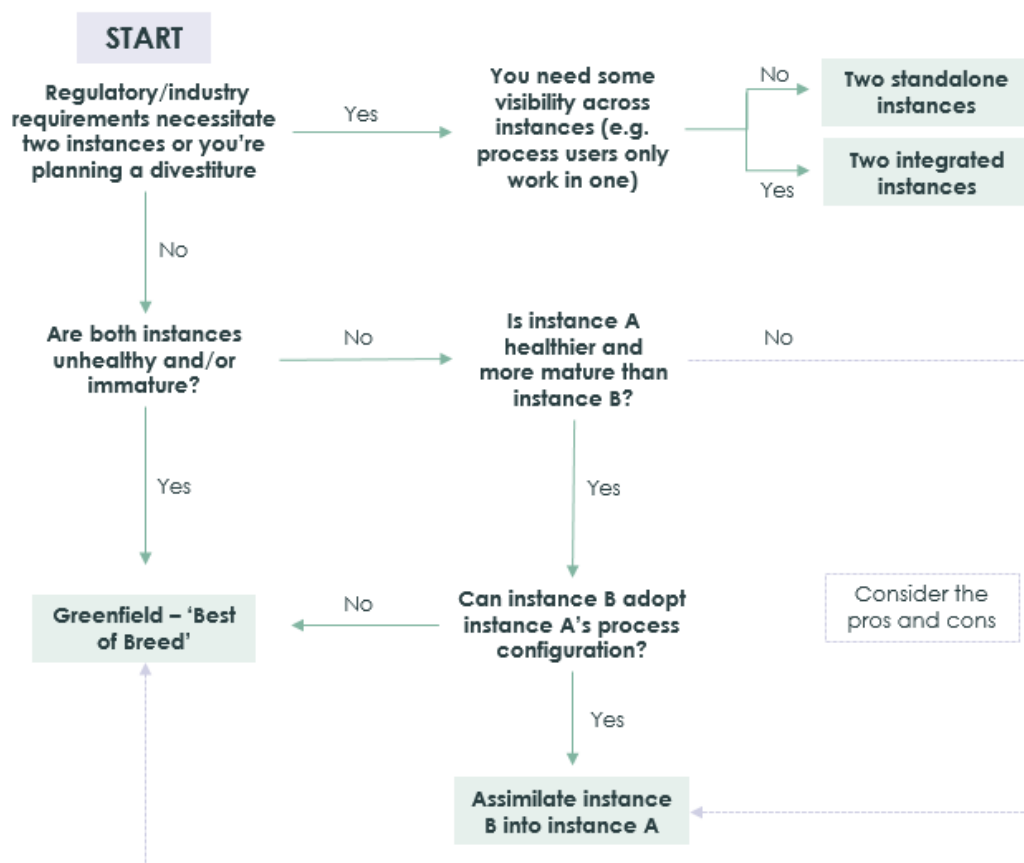


Figure 3: Instance scenario decision tree

INSIGHT 1:

Evaluate the health and maturity of your existing production instances before deciding on your future instance footprint

Understanding the maturity of your existing production instances does not require you to thoroughly understand every single process running on ServiceNow – which you will tackle in [Step 3](#) – but having a high-level evaluation of your existing instances will help you assess the pros and cons of your consolidation options.

Our most successful customers recommend the following best practices to inform your instance consolidation decision.

Best practice

Use ServiceNow HealthScan to objectively evaluate your instance health. For ServiceNow instances, work with ServiceNow to run a [HealthScan](#) or [Configuration Review](#) for each of your instances. This will give you insight into five key categories, listed in Table 2. In general, an instance that scores higher in these categories is healthier. Work with ServiceNow to benchmark your scores against the scores, complexity, and scope of similarly sized peers, so you can better understand how your instance health compares to similar customers.

Category	Impact
Manageability	The upkeep of the system is manageable. There is not significant code, the CMDB is setup correctly, etc.
Performance	The “under the hood” of the instance is working efficiently. Queries and reports load quickly, and the application is responsive.
Security	A high score represents an instance with lower overall risk. It is already configured to minimize the risk of internal and external threats.
Upgradeability	It will cost you less time and money to perform upgrades in an instance with a high score as it is more likely to be out-of-the-box functionality. Going back to baseline can be timely and cost consuming, so you should think critically about moving forward with an instance that has a low upgradeability score.
User experience	The instance is set up in a way that makes it easy and seamless for users to interact with it.

Table 2: HealthScan considerations

Best practice

Evaluate the management maturity, configuration, and adoption associated with your current instances. Work with the governance functions (likely application portfolio governance) that oversee your instances to answer these questions:

- How many processes have been automated on the instance to reduce human touches?

- What is user sentiment like?
- Is mature governance and demand management in place?
- How easy would it be to upgrade the instance? How much customization has been implemented? How much technical debt is there?
- Are the processes implemented on the instance meeting the needs of the business?
- What are the current usage metrics—incidents, knowledge base views, etc.—associated with the instance?

Thinking these considerations through can lead you toward or away from pursuing a specific instance architecture. For example, if one instance has 10,000 more monthly active users than the another, it likely makes sense to “assimilate” to the one with more usage, unless you elect to go Greenfield. You will need to consider the relative weight of these factors depending on your use case and ServiceNow objectives.

Best practice

Go Greenfield if there is an opportunity for it. Starting with a fresh instance enables collaboration and a clean slate for designing processes that work for everyone. Starting from scratch gives you the opportunity to rethink legacy process models and governance, eliminate technical debt and stay closer to baseline, and potentially rebrand as a new IT organization. It also makes sure that you are on the latest ServiceNow release. Going Greenfield will generally make it easier to achieve your desired business outcomes.

In the simplest case, one or more of your ServiceNow instances may have overall poor health and immature processes, such that it makes sense to start fresh with a Greenfield instance. In other cases, the decision might not be so black and white. If one instance is close to baseline, is generally healthy, and all parties can adopt most of the processes on the platform, it may be more cost effective to assimilate into that instance.

“It’s about the value of being on one platform and the value that brings to the business. It’s about connecting to the business. It’s the connection across the enterprise that streamlines it.”

– A ServiceNow customer

As you think through the various scenarios, consider the impact to your users and customers as well as the constraints that guide your instance consolidation program. You’ll need the support of governance functions and input from ServiceNow and/or an external partner to define your desired future architecture for ServiceNow before you move on to the work of executing your consolidation.

Note: The remainder of this Success Playbook focuses on the steps to take if you consolidate instances, either through the assimilate or Greenfield option. See ServiceNow Product Documentation for information on the [ServiceNow eBonding spoke](#), as well as [this lab available on our Developer Portal](#).

INSIGHT 2:

Don't limit design to your instance footprint – Map out your desired ServiceNow architecture

With your consolidation decision in hand, you should be able to design your desired ServiceNow architecture to understand how your instance footprint will interact with other technologies. This reference architecture will enable you to easily visualize how ServiceNow comes together with other technologies to help your organization meet its objectives. Our most successful customers evaluate their technology roadmaps and work with ServiceNow and/or partners to identify where they may have redundant functionality, laying the groundwork for actions you'll take in [Step 3](#).

Consider the following best practices.

Best practice

Understand what's coming on the ServiceNow roadmap. Work with your account executive to identify how upcoming functionality may complement or eliminate the need for your existing technology solutions. Additionally, visit the [Developer Community](#) and attend [events](#) like Knowledge to learn about the capabilities coming in new releases. Conducting this research early will bring clarity to what you want to keep, enhance, or eliminate during the consolidation.

Best practice

Evaluate how the components of your ServiceNow architecture complement each other and advance your strategic objectives. Instance consolidation is an inflection point and is a perfect opportunity to understand where the Now Platform fits within the strategic context of your technology stack. By evaluating your [ServiceNow architecture](#) (rather than just your instance footprint) you should be able to articulate the benefit each application provides and how it advances the goals of your use case and strategic objectives.

You should also be able to determine where you have major gaps in current-state architecture that can be resolved as part of your consolidation program or in the future. Determine which systems that integrate with ServiceNow are critical to keep, which are redundant or don't provide value and must go, and which should be replaced by something else (see [Step 3](#)). For example, you may decide to use ServiceNow capabilities for

enterprise onboarding, rely on another system's capabilities, or both, and will need to determine how these systems integrate with each other.

Figure 4, below, depicts an example reference architecture with current-state functionality, future-state functionality, and functionality integrated with ServiceNow outlined. This blueprint, along with the outcomes you're seeking to achieve in your consolidation program, will help you design efficient workflows across your technology platforms.

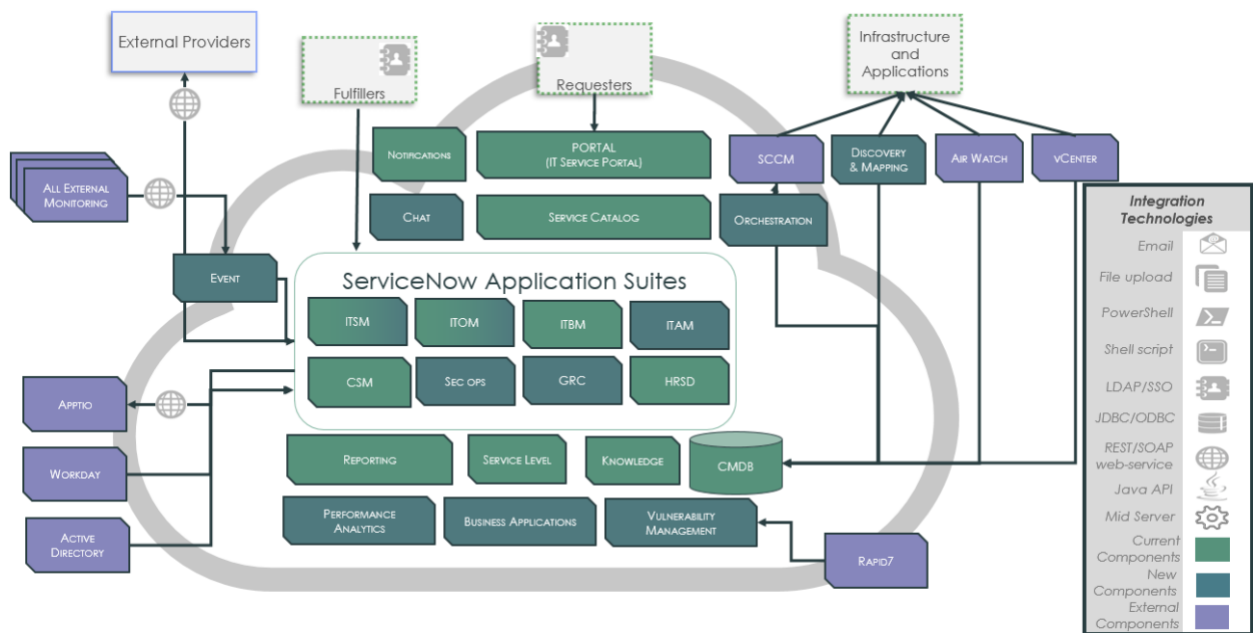


Figure 4: Example of a future-state ServiceNow reference architecture with external components defined

Note: The consolidation program is a good time to evaluate additional ServiceNow applications that neither instance currently supports. Our customers find it more efficient to implement new functionality as part of an already-resourced consolidation program, than as a separate project in the future. It's important to consider how these additional capabilities fit in your future-state reference architecture and advance your strategic objectives.

Action Step 3: Define governance and resource requirements for your consolidation program

Consolidation is a large-scale, cross-functional effort. You need to make sure that you have the right governance in place to drive the program and that the right stakeholders are involved. You should use the instance consolidation as an opportunity to transform your operating model for the Now Platform, which will help to streamline long-term maintenance after consolidation.

Additionally, you need to make sure you have the resources, including the right program and technical expertise, in place to keep you focused and on track. With your objectives, constraints, and reference architecture in hand, you should be able to identify the resources you need to realize outcomes.

INSIGHT 1:

Consolidate existing governance resources to support instance consolidation and long-term stabilization

Unless you already have enterprise governance over your multiple instances, consolidate your existing governance functions and redefine your operating model to support the instance consolidation. By keeping your governance and operating model as is, you run the risk of delaying your consolidation due to varying technical standards and approaches to completing work. Strive to minimize disruption to your existing governance structures as you steer the consolidation program but make sure to align on a common set of processes moving forward. Consolidate your governance functions and ask them to address the following actions to help the platform team deliver on tactical consolidation work:

- 1. Define a single point of escalation.** This individual might be your executive sponsor or someone delegated by your executive sponsor. While each existing instance might have its own point of escalation before consolidation, it's critical to have one ultimate decision-maker for all work related to the consolidation as well as for long-term maintenance and continuous improvement.
- 2. Stand up a strategic steering board.** This group will oversee the strategic program for consolidation and beyond and make sure that work during the consolidation effort aligns to strategic objectives. Include members who will define the business outcomes expected from consolidation. Consider consolidating members of your existing strategic governance boards (or executive steering committees) to maintain continuity instead of identifying new individuals.
- 3. Extend your existing demand intake processes to the newly consolidated instance (or create new processes).** Regardless of whether you adopt an existing demand intake process or create a new process, make sure that your backlog prioritization process aligns with your strategic objectives for consolidation.
- 4. Develop a unified set of technical standards and policies via a consolidated technical governance committee.** You want to make sure that everyone adheres to the same technical best practices to drive consistency, reduce risk, and make maintaining and scaling the platform easier. If you already have mature standards and policies on one of your instances, adopt those for the new instance, assuming you assimilate or start Greenfield on a single instance. If you don't, use this as an opportunity to revisit policies about naming conventions, data storage, customization, and other technical considerations.

Read our playbook and checklist on [building a dedicated, dynamic governance process, policies, and team](#) for more guidance on establishing governance for your consolidated footprint.

INSIGHT 2:

Evaluate your existing resources and determine if you need more

Depending on the scope and constraints of your consolidation, you may be able to use your existing team and partner resources to complete the consolidation work, or you may need to hire additional resources (within the constraints you established with your executive sponsor). At a high level, think about three considerations:

- What is the minimum number of resources required to continue running my existing production instances until they are consolidated? Any resources beyond this number can be shifted to focus on consolidation work.
- Do I have adequate, available PMO resources to help manage the consolidation? If you have these resources in house, how much capacity do they have to support the consolidation program? If you don't have resources in house, who will fulfill this function?
- Do I have the right business and technical expertise among my staff to implement our desired architecture and realize business outcomes? Think about the skills your current platform team(s) have. Are those enough to realize your objectives?

If you determine that you do need additional resources, start by considering a partner certified in the applications you're consolidating, especially if you chose to use one for objectives setting. The partner can supplement your existing staff and take on the program management and/or tactical configuration work that lets you focus more on strategy and meeting the daily demands of the business.

Additionally, our most successful customers identified the following best practice.

Best practice

Source entry-level staff to complete basic daily tasks, freeing up your more skilled resources to focus on consolidation work. Depending on how you use your existing production instances, you may be able to augment your team with low-cost resources that help you keep the lights on while you shift your more experienced staff to focus on process and business service design.

What to do next

Now that you've created your blueprint for the consolidation program and defined your reference architecture, you're ready to start planning for the more tactical work of marrying your instances, starting with defining the workstreams in your program plan.

Step 2 – Build your consolidation plan

KEY INSIGHTS

- Focus on user experience, configuration, and OCM as you define your program workstreams.
- Make sure you have dedicated program management in place and take an iterative approach to tactical work, breaking it down into specific, manageable sprints.
- Minimize disruption to the business and your customers by pushing pause on strategic work unrelated to the consolidation.
- Define your cutover and data retention strategy early to minimize risk and comply with various data regulations, policies, etc.

Consolidating your production instances can be a resource-intensive activity. Running day-to-day business on ServiceNow while undergoing instance consolidation means you need to thoughtfully plan, organize, and coordinate so you can move fast and minimize disruption to the organization. Your consolidation plan should involve key stakeholders across your organization to make sure that you meet the objectives of your use case within the constraints defined in [Step 1](#).

Complete the following action steps to build your consolidation plan.

Action Step 1: Define the workstreams for your consolidation effort

Your instance consolidation will span multiple functions that you'll need to hold accountable for deliverables throughout the program. Dividing consolidation tasks into workstreams enables focus and accountability for specific tasks. In [action step 2](#), you'll coordinate these workstreams into a program plan that provides an end-to-end view of the major milestones, timelines, and dependencies for consolidation.

INSIGHT 1:

Focus on three themes—configuration, user experience, and OCM

The number of workstreams you require will depend on your use case and constraints, the ServiceNow capabilities you're using today or plan to use in the future, and your organization's complexity and specific needs. Where possible, you should aim for a minimally sufficient number of workstreams and “cooks in the kitchen” to reduce complexity and the

time it takes to make decisions. In all cases, workstreams should address process and workflow configuration, user experience and design, and OCM. See Table 3 for an example.

Theme	Workstream	Recommended owner	Example deliverables
UX/design	User experience	Experience architect or design team leader	<ul style="list-style-type: none"> • Inform configuration teams on user-centric design. • Conduct end user usability testing. • Validate that forms are easy to use, quick to load, etc.
Configuration	ITSM	Business unit leader or primary process owner	<ul style="list-style-type: none"> • Evaluate the maturity of existing processes. • Design and document future-state processes. • Complete tactical configuration work.
Configuration	ITBM	Business unit leader or primary process owner	<ul style="list-style-type: none"> • Evaluate the maturity of existing processes. • Design and document future-state processes. • Complete tactical configuration work.
Configuration	Testing	QA lead	<ul style="list-style-type: none"> • Create and maintain test scripts for configuration. • Run automated and manual tests. • Identify areas for a simpler, more intuitive design.
Configuration	Deployment	Release manager or enterprise architect lead	<ul style="list-style-type: none"> • Develop the cutover, system deprecation, and data retention plan.
OCM	Change management	OCM lead or someone with OCM experience (e.g., an HR lead)	<ul style="list-style-type: none"> • Conduct a change impact assessment and evaluate change risks. • Keep the business informed about upcoming changes via lunch and learns, flyers, and how-to videos. • Keep customers informed about upcoming changes. • Monitor and drive adoption.
OCM	Training	Training lead	<ul style="list-style-type: none"> • Create and maintain training plans. • Execute training for process and/or end users who will use new or unfamiliar processes.

Table 3: Example of workstreams in a consolidation program

This example is not all inclusive but highlights the primary categories of work to perform as part of consolidation. Tailor your workstreams to reflect the unique needs of your business. Depending on your overall technology stack and complexity, consider a workstream dedicated to platform operations, which could include topics such as integrations, machine learning, and performance analytics.

Even though some workstreams may complete work earlier than others, define them all upfront so that your stakeholders know what to expect and understand their involvement in the effort.

Consider these best practices from a Fortune 500 ServiceNow customer.

Best practice

Each of your workstreams should have a specific purpose, owner, and concrete deliverables. The purpose of your workstreams is to keep work organized and aligned with the resources that are most qualified to complete that work. Starting with the workstream themes that are critical for success—user experience, OCM, and process and workflow configuration—determine what each of your workstreams will be responsible for and who the accountable party will be (that is, who will present the progress of workstream tasks at a program readout). Note that workstreams for process configuration should be aligned with the Now Platform workflows/capabilities (for example, ITSM, ITBM, ITOM, etc.).

Best practice

Engage focus groups throughout the consolidation program to incorporate the voice of end users and process users. The most valuable feedback on process configuration, user experience, and OCM will come from the individuals who will use ServiceNow each day. Expose them to planned configurations and solicit feedback, both for better process design as well as to develop consolidation champions who will promote adoption. Make sure that you invite users beyond those in the IT department—include end users as well as process users.

“We wanted to use focus groups for look, feel, and functionality.
We knew that there was confusion and wanted to engage users in and outside of IT.
We didn't want to design this in the bubble of our [platform] team.”

– A ServiceNow customer

Action Step 2: Determine when and how workstreams will complete work

The workstreams you defined for your consolidation effort will provide the framework in your teams, with the support of ServiceNow experts and partners where appropriate, to complete the work required to meet your business outcomes. In addition to defining workstreams, you need visibility into progress within and across workstreams to make sure your consolidation

stays on track. You also need a clear method for tracking and completing work that enables flexibility in response to unforeseen challenges or work completed ahead of schedule.

INSIGHT 1:

Make sure you have a dedicated program management in place

The key to consolidating your production instances quickly and with minimal disruption, is to stay organized and have a line of sight into work and any potential risks. This requires a comprehensive program plan, clear management and oversight, effective cross-functional communication, and use of technology to accelerate the program.

Depending on the scale of your program and available resources, use your internal PMO to drive the effort or engage a partner for program management. This makes sure you can focus on consolidation work while you continue to run your existing production instance(s). Program management should guarantee:

- Proper sequencing so that workstreams dependent on other work are completed later
- Clear ownership or spans of control for workstreams and processes to call out risk
- The ability to stay organized and involve the right people at the right time
- Flexibility to shift work depending on progress and resource availability
- Thoughtful OCM (covered in [Step 4](#))

Consider the following best practices from our customers and internal experts.

Best practice

Compile an overall program plan, documenting key milestones and dependencies across workstreams. Your high-level program plan should serve as a 30,000-foot view of the work that must happen to deliver a successful on-time and on-budget instance consolidation. The plan should be at an altitude that provides enough detail into the major work underway but does not dive into the tactical steps within each workstream—these are better served within individual workstream plans.

Best practice

Sequence your workstreams based on your organization's context and align them to a standard implementation sequence. Table 4 provides a framework for sequencing your workstreams.

Phase	Workstream activity
1 – Planning and design	<ul style="list-style-type: none"> Few workstreams are involved. Your PMO is forming workstreams and you're working with your executive sponsor to design the overall consolidation effort. OCM team can start initial planning.
2 – Process definition and requirements gathering	<ul style="list-style-type: none"> Teams assigned to specific workflows or capabilities (like ITSM) define current-state and future-state process configurations. UX/design is incorporated in future-state process design. The testing workstream begins initial planning.
3 – Configuration and testing	<ul style="list-style-type: none"> Teams assigned to specific workflows or capabilities primarily manage this. The testing team creates test plans early and executes testing, including user acceptance testing, after configuration. UX focus groups are conducted throughout configuration. Training occurs at the end of configuration to align training materials with production configuration and groom early consolidation champions. Deployment planning or coordination takes place.
4 – Training	<ul style="list-style-type: none"> The deployment team updates the training environment and begins to run cutover dry runs and assess go-live readiness. OCM and training workstreams execute the deliverables. Partners complete the relevant knowledge transfer, if applicable.
5 – Go-live	<ul style="list-style-type: none"> The deployment team drives the go-live. OCM and training teams become involved as needed for support.
6 – Post go-live stabilization	<ul style="list-style-type: none"> OCM and training teams continue to drive adoption. Product workstreams collect or incorporate feedback as applicable.

Table 4: Workstream sequencing

Not all workstreams will complete work at the same time, though there will be overlap. While the bulk of some workstreams' deliverables may occur in a specific phase, you can expect certain workstreams to be involved across phases. For example, the OCM workstream will execute most of its deliverables in phases 4 and 5 in the table above. However, begin OCM planning in phase one or two.

Figure 5 is an example of a program plan that combines some of the workstreams above and sequences their involvement. Work with your platform team(s), partner, and/or ServiceNow to sequence the work to fit within your constraints. Your timelines will depend on the number of workflows you're consolidating, the number of users impacted, and any

specific targets relevant to your use case. Work can progress at a different pace than originally planned but mapping out the work will help you understand the downstream effects of any delays.

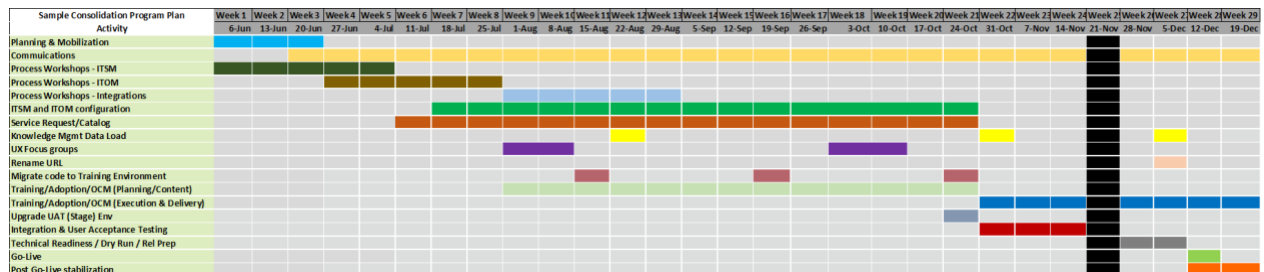


Figure 5: Example of an instance consolidation program plan sequence (for illustrative purposes only—
timeline and workstreams should match your business context)

Best practice

Review your program plan frequently with governance functions. While it's best to have the PMO own and manage the program plan, also review it during strategic governance meetings and program check-ins with your executive sponsor, workstream leads, and other stakeholders. Your reviews should not just assess progress but drive a clear understanding of the roles and responsibilities across stakeholders.

INSIGHT 2:

Be iterative – Break tactical work down into specific, manageable sprints

The workstreams you established can be daunting, since there is a lot to be done in a short period of time. Workstream leaders should break the work down into sprints, using iterative methods where possible. This not only helps them see tangible progress over time, but it also helps them maintain flexibility and devote time to running the business, if they have responsibilities beyond consolidation.

Consider the following best practices from our customers.

Best practice

Take an Agile approach during the build phase, breaking down work that must be completed into sprints comprised of user stories (see [Step 3](#) for creating stories during process design). Most customers with consolidation experience plan out the exact period (typically a two-week period) in which a chunk of work should be completed, considering any dependencies. This approach makes sure that the team working on the configuration is focused on specific outcomes during each sprint and offers flexibility as issues come up. Having a line of sight into specific outcomes and dependencies will minimize wasted time during the project when you're trying to determine what to focus on next. At the end of

each sprint, follow any development work (like that for process configuration) with unit tests and demos of the functionality for process owners to make sure the work meets requirements.

At the time there was no PMO and we leaned very heavily on our partner. They were an Agile shop. We had sprints and each had outcomes that were expected.

There were workstreams above those sprints,
so we knew when we were going to be working on all things."

– A ServiceNow customer

Best practice

Sequence your sprints to prioritize low effort and high value as well as foundational work. Front load the configuration work that already has an agreed-upon design, and that is easy to configure. Many customers will start with Service Portal, Knowledge Management, and other highly used functionality that shows improvements in experience upfront and drives adoption. Save more complex applications that might not have the same levels of use for later in the consolidation program. The only exception to this is foundational functionality that multiple parts of the platform rely on, such as the CMDB*.

A note on the CMDB

Populating your [CMDB](#) from scratch, assimilating a new organization into an existing CMDB, or consolidating two separate CMDBs is complex and likely requires its own workstream, which should be one of the first you kick off. There are a few key factors to consider in designing a CMDB model:

- **Key base classes approved by your technical governance group** – These include the attributes that you want to capture in the CMDB, such as business applications, servers, and classes which include routers, switches, firewalls, etc. Most customers hold a workshop with key stakeholders to define the classes they would like to include.
- **The reconciliation process for configuration items (CIs)** – This includes a discussion about what takes precedence within each class, the source of truth for data (like [Discovery](#) or something else), and any [reconciliation rules](#).
- **Governance of the CMDB, i.e., who will maintain control over the configuration** – This can be assigned by class and entails who can modify records, what approvals are needed, etc.
- **Certification of data, i.e. periodically reviewing the CMDB for accuracy** – You should determine what type of CMDB information in your platform should be validated, on what frequency, and who will be responsible for verifying the information. Complete the [certification planning steps](#) early on for a more seamless validation process.

If you choose to go Greenfield, consider [using Discovery to automate populating your CMDB](#), and then add in items manually as needed. If you're assimilating instance A into instance B, start by importing “skeleton” records, such as IP addresses, serial numbers, MAC addresses, and names into instance B. Then, run Discovery to populate all other information and manually add business applications. Learn more about [managing your CMDB](#) by using resources available on the Customer Success Center.

INSIGHT 3:

Minimize disruption to the business and your customers

Throughout your consolidation journey, be cognizant of the impact that program work might have on business operations and customers. Take steps to make sure your resources are appropriately allocated to keep the lights on while you work on the consolidation. To the extent possible, minimize switching costs by having workstream participants allocate most of their time to consolidation efforts as applicable.

Consider this best practice from customers.

Best practice

Postpone any strategic or implementation work that isn't directly aligned with consolidation. Be judicious about splitting your resources between keeping your existing instance(s) running and devoting time to consolidation efforts. Depending on your target instance architecture, most customers will continue performing only those tasks required to run the business in their existing instance footprint (such as addressing incidents, pushing changes, etc.) and will hold

off on any new or strategic work (like building out new workflows, implementing a new product, etc.). If you have adequate resources and are assimilating them into an existing instance, it may be possible to continue completing new strategic work, as long as it aligns with consolidation objectives.

Note: Consider how your consolidation timing aligns with your upgrade schedule. If your decision is to go Greenfield, the new instance will already be on the latest version and you don't need to upgrade. If you're assimilating one instance into another that's on an older version, it's worth upgrading that instance before you start any significant consolidation work. This allows you to start your consolidation program with all the latest security upgrades, features, and capabilities that will enable your business objectives. It also reduces the likelihood of additional upgrade-related rework after consolidation.

Use the Now Platform to accelerate your consolidation effort

The Now Platform includes several applications that can enable the consolidation effort. Depending on your maturity, it may make sense to use ServiceNow applications to manage work instead of using additional systems. You likely won't want to implement new functionality solely to support consolidation work. But if you're already using ServiceNow capabilities in your business today, it's worthwhile to repurpose them.

At the most basic level, you can use the Service Portal and Knowledge articles to act as a source of truth for the consolidation program, keep everyone aligned on progress, and provide a space for common questions. If you're already using the ITBM suite, you can use Portfolio Project Management for program and project management. Keeping everything aligned in the system gives you one system of action and one system of record for consolidation.

In addition to the applications above, consider other applications and modules depending on your needs. This list is not exhaustive, and you should connect with your account executive to determine what other ServiceNow capabilities can support consolidation.

- Application Portfolio Management – To align your application portfolio with your consolidation objectives and drive application rationalization
- Agile Development – To manage the development work required throughout the program
- Vendor Management – To evaluate and track the performance of partners and other external vendors
- Demand Management – To track any new demands for the consolidation effort and provide a structure to determine what to prioritize
- Analytics and Reporting – To track outstanding tasks and progress against the program plan, issues and risks, etc.
- Surveys and Assessments – To poll your organization to support OCM

Action Step 3: Establish a clear cutover and legacy decommissioning plan

An integral part of business continuity when consolidating instances is having a clear plan for cutover. Make sure that everyone impacted by consolidation knows what instance they're supposed to work in, by when. You may also need to retain access to data in your legacy system, which requires a data retention strategy.

Start a conversation early with your strategic governance group to decide on your cutover date and decommissioning plan for your legacy instance and revisit this decision at each milestone in your consolidation program. Work with your technical governance committee to make sure that plans for cutover align not only with your strategic needs but with your technical needs and constraints. If you're working with a partner, make sure to build in time for knowledge transfer before the engagement ends.

INSIGHT 1:

Define the milestones on your "road to cutover"

You need to determine a specific date and time when your users will move from your legacy instance(s) to the consolidated instance. Work with your strategic and technical governance committees to determine a time that is least disruptive to your business and your customers. But this is only the first step. Also set milestones for:

- Identification of all risks to cutover and mitigation measures that need to be put in place (Think about the "entrance criteria" for production.)
- Your final go/no-go decision on cutover, based on your identified risks

Table 5 sets the recommended timing for these milestones. Depending on the size and complexity of your consolidation program, you may need to set these milestones earlier.

When	Action
Three months before go-live	Identify the specific date and time when you'll start using your newly consolidated instance.
The four weeks leading up to go-live	Schedule sessions with your executive sponsor, technical leaders, and stakeholders to identify risks to cutover and mitigate them appropriately.
One to two days before go-live	Schedule a go/no-go decision with your key stakeholders and governance committee members to determine if the organization is ready to move forward.

Table 5: Cutover milestones

Our customers suggest this best practice.

Best practice

Be disciplined—make sure all new work (such as incidents, knowledge articles, etc.) is completed in the consolidated instance after the cutover. For any items that are still outstanding in the legacy instance(s), allow a 60- or 90-day period for them to be closed out in those instances. After that, any items still outstanding should either be migrated or manually entered in the new instance. Minimize the number of legacy records you're bringing over, since cutover is a chance to start with a clean slate.

INSIGHT 2:

Limit data migration from your legacy instances

As you're consolidating your production instances, you might be tempted to move legacy data from your existing instance(s) to your new one, especially if your compliance policies require you to maintain your data for a period of time. Moving legacy data over can be a resource-intensive activity that requires complex mapping of data structures. You have other options for your data retention strategy separate from migration. See Table 6.

Option	Considerations
Keep legacy production instances running	<ul style="list-style-type: none"> • Ability to access data and configuration at any time • Costly due to licenses and potential maintenance • Potentially limit access to a very limited user set
Degrade the existing production instances to sub-production or take them offline	<ul style="list-style-type: none"> • Ability to access data and configuration at any time • Can run the instance in the background or on a server • Less costly than a production instance but still requires technical resources for occasional maintenance and potential server costs
Migrate data to a data warehouse or data lake	<ul style="list-style-type: none"> • Ability to access data • No access to process configuration • Relatively inexpensive

Table 6: Data retention options and considerations

Our customers suggest keeping this best practice in mind.

Best practice

Migrate as little data as possible to your new instance and export the rest to a data lake or data warehouse. Our most successful customers migrate only foundational data, such as user data, support groups, and knowledge articles that are still applicable. Depending on your setup, it may also make sense to migrate some key CMDB items such as the [CMDB server](#) and [business application](#) tables.

Data lakes or data warehouses separate from your instance provide an inexpensive option to store and access legacy data when needed without having to maintain a separate legacy instance over time. Make sure that you follow data regulations specific to your industry and organization to stay in compliance. You should maintain a chain of custody to prove that no data was altered during the migration process.

What to do next

Coming out of Step 2, you should have a consolidation plan that gives you a structured approach to your consolidation work. You should also have a plan for cutover and a data retention strategy to deliver a seamless transition that makes sure you meet any data and compliance requirements. With a plan in place, you have the foundation to configure processes, data models, and services on your consolidated instance.

Step 3 – Design your consolidated processes, data model, and services

KEY INSIGHTS

- Use a cost-benefit analysis, along with your use case constraints, to show you where you'll adopt existing ways of doing work and where you might adjust or start from scratch.
- Clearly document your design requirements to use as a basis for tactical configuration and for posterity.

Instance consolidation is a chance to rethink how you use the Now Platform to advance your business outcomes. It's an opportunity to revisit:

- Your processes
- How you structure your data, form design, and user interface
- The capabilities you'll use moving forward

Begin by evaluating what's working or could be improved today and identify the configuration changes that meet your objectives and that simplify work for your process owners, process users, and end users.

To accomplish this, complete these action steps.

Action Step 1: Conduct an analysis of your current configurations

To plan configuration and design for your consolidated instance, you first need to understand how work is done today in your existing instances. As you assess the current configuration of your processes, data, and user experience, consider the business needs that are driving configuration and the way your organization completes work. Your analysis should inventory the:

- **Configuration differences between your instances in shared processes and between your instances and out-of-the-box processes** – You should be able to source this information from process owners and/or managers for each instance.
- **Configuration differences between your instances in your data models** – Include how they do or don't align with ServiceNow's Common Services Data Model.

- **Configuration differences between your instances in user experience** – For your end users, include the designs of your Service Portal, service catalog(s), service offerings, and features, like chat. For your process users, include the form, field, and workflow designs.
- **Differences between your instances in application usage** – This is especially important for scoped applications created for specific user groups.

Assess these differences during your consolidation to determine where to remove redundancy, improve your outcomes and adoption, and improve how you manage the Now Platform.

INSIGHT 1:

Use a cost-benefit analysis as your primary lens

Base your assessment on whether your current configurations are helping you achieve your business outcomes and requirements. As one of our Fortune 500 customers puts it, “The consolidation effort is a chance to get rid of the bad and start with a clean slate.” Don’t replicate a configuration that already exists in a new instance or continue what you’re doing within an assimilated instance without understanding how it adds business value. Consider these questions:

1. **How do process-specific KPIs compare between our instances?** Though you’ll assess other factors as well, looking at the performance of the same processes across instances (such as the mean time to resolve incidents) might show you the value of your configuration differences across instances. Keep in mind that you need sufficient longitudinal or historical data to make a fair comparison. Be sure to supplement this data with what you’ve learned from process owners, managers, and users.
2. **Do our current configurations get in the way of efficiency and automation?** To the greatest extent possible, automate your processes and services and configure them to require the fewest number of manual touches. If, for example, you have a process in which approvals happen 100% of the time, you probably don’t need the approval step. Also consider whether consolidation presents an opportunity for process-specific automation that you may not have implemented (such as change approval policies).
3. **How do adoption and use compare between our instances?** Relatively lower use of the same functionality (like chat for end users or Predictive Intelligence for process users) may point to challenges in your experience design and/or process configuration. Assess these comparisons for custom applications and catalog items to determine what you can safely turn off.
4. **How consistent are the process flows in our instances?** For the most part, each process should flow the same for all users. If you find significant variation in how stakeholders follow the process or how certain scenarios fit into the process, you might need to adjust

it. You can enforce consistency by implementing a structured data model that leaves little room for process variation.

- 5. How consistent, comprehensive, and efficient are the data models between our instances?** Focus on how CIs are defined in your CMDB, how Discovery is set up to support the CMDB population, and how demographic data is defined for users and user groups, so you can make sure you have the minimally sufficient data you need to support your outcomes.

Keep in mind that complexity—whether in terms of process, experience, or your data models—can be a good indicator of cost. Your work to configure the consolidated instance should guarantee that any requirements for configuration have clear, demonstrable business value that outweighs the cost of implementation and support. Our customers have also articulated three best practices that support this analysis.

Best practice

Group your analysis work into sprints that align with your program plan (see [Step 2](#)). For example, depending on your complexity, you can choose to focus on each ITSM process—incidents, problems, changes, etc.—in its own sprint or dedicate one or more sprints to the entire ITSM application. You may find that it makes sense to conduct your gap analysis and design your future process configuration before you move on to the next sprint. Keep in mind the process steps that occur outside of ServiceNow, including work that happens in other systems and is reflected via integrations or work that's currently completed in email, Excel, or other external tools.

Best practice

Involve process owners and stakeholders from all sides. While you want to limit the number of stakeholders involved, you need to understand all business perspectives. If each instance, before consolidation, has its own distinct process configuration, consult the process owners and/or key stakeholders who are responsible for these process during your analysis. Make the consolidation effort as collaborative as possible.

“We made it clear throughout the process that we weren't going to lean towards one organization. We sat down with both process owners from both organizations and said, ‘Let's go through each process and let's make it the best of both worlds.’”

– A ServiceNow Healthcare customer

Best practice

Evaluate your integrations as part of your analysis, striving to cut down on redundant workflows and minimizing data transfer when possible. Use this analysis as an opportunity to evaluate specific capabilities that each of your integrations offer and how they help you achieve your use case and broader outcomes. Evaluate process steps across systems (including dependencies), trigger actions for transferring data, what data is integrated and how, etc. Consider these questions as you evaluate your current integrations:

- How do external systems work with ServiceNow to provide business value? Does the business value delivered match our requirements?
- How long does it take to exchange data with external systems, and how does that affect downstream processes?
- Is integration fostering collaboration or is it contributing to breakdowns and delays?
- What is the release cycle for new functionality in external systems, and does the roadmap align with our vision for ServiceNow? Should we consider replicating workflows performed in external systems in ServiceNow instead?

Refer to our Success Checklist for [implementing integrations with ServiceNow](#) for additional context and considerations.

EXPERT TIP

To the extent possible, support your analysis with direct observation, discussions, and/or workshops with process users. Walking through workflows in a live setting (as opposed to relying only on process documentation) generally leads to better outcomes.

Action Step 2: Design and document configuration on your consolidated instance

Your evaluation of your current state will inform your design and the documentation of how your consolidated instance will be configured, including the underlying data model and services you will offer. Make sure your design considers the needs of multiple users and stakeholders, follows clear standards, and drives your organization toward your desired outcomes. This is your chance to rethink the way work is done so it's more efficient, transparent, compliant, and simple to understand.

INSIGHT 1:

Use your analysis and constraints to inform whether you should adopt existing configurations or start from scratch

Take a cost-benefit approach to determine how you'll move forward, keeping in mind the constraints of your consolidation use case—how much time and resources you have will drive where you lift and shift your existing ways of doing work versus starting from scratch. The analysis that you completed on your current state will set you up for one of three outcomes:

- 1. Adopt as is** – If you determine that your current configurations and services meet the goals of the business, are relatively mature, and can be easily adopted by process users (new ones included) moving forward, simply lift and shift. There's no compelling reason to invest time in rework. Depending on your instance strategy, this might mean little to no additional configuration or a simple copy from one instance to the other.
- 2. Adopt and adjust** – Take an existing configuration or service and adjust it if it's meeting most or all the related business objectives, is mature or on the path to maturity, and can be easily adopted by new and existing users. Simple tweaks are generally less time consuming than starting from scratch and are already known to many process owners and users, minimizing the need for additional training.
- 3. Start from scratch** – If a specific process, data model, or service doesn't exist today, is poorly adopted and/or relatively immature, doesn't advance your business objectives, or cannot be adopted relatively easily by both sets of process users, consider starting from scratch. While it's more time consuming, this gives you an opportunity to collaborate and create a comprehensive design that aligns with your vision and works for everyone.

Your ability to enhance how you're currently doing work will depend on the resources you have for the consolidation effort, including time and budget. If you have limited resources, prioritize enhancing foundational elements, such as CMDB configuration or processes and services that, left unchanged, will impede your ability to achieve your objectives.

Our customers voiced the following best practices when defining future-state configurations.

Best practice

Take a collaborative approach to design a best-of-breed instance. It's tempting to adopt current configurations from one instance, but this approach can be shortsighted and might lead to rework down the road. Consolidating instances can be an opportunity to improve processes and experiences and to rebrand your organization to support a single business entity, depending on your consolidation use case. If you take a collaborative approach to selecting the best-of-breed configurations from each of your pre-consolidation instances, you're more likely to create a design that not only improves your outcomes but also offers your process owners an opportunity to work together in the pursuit of shared outcomes.

Best practice

Engage your process users as you design new configurations. Walking through the process step by step, with demos when possible, with the individuals that will be executing the process is the best way to stress test your design of both the process and user experience. These users are the experts in the process and can validate whether all the critical steps are captured and designed efficiently. Completing user acceptance testing early will also help you identify any issues and build champions before the broader rollout, saving you time and rework.

Best practice

Start simple with process design and grow into complexity. Especially when designing net-new processes from scratch, strive to design a minimally viable product and evolve it over time. Starting with complexity before you operationalize a process can be difficult to maintain and resolve once live. For example, onboard customers with basic Customer Service Management workflows with role-based agent routing before you implement more complex skill-based, time zone-dependent routing.

Best practice

Use the consolidation governance model you set up in Step 1 to move past any disagreement about future-state configuration. Invariably, you'll run into situations when stakeholders have a difference in opinion about the best way to move forward with specific configurations. Acknowledge everyone's input and carefully evaluate their perspective. Then, defer to the decision-making body you established to make a decision. If the design is highly controversial or will affect business outcomes, involve senior leaders and your executive sponsor. These types of design considerations will often necessitate significant championing and OCM to drive adoption.

Best practice

Follow common ServiceNow data principles, as outlined in the Common Service Data Model (CSDM). The CSDM represents a shared set of service-related definitions that span the ServiceNow product portfolio and the Now Platform. This standardization drives consistent use of standard terms and, more importantly, accurate service reporting within your instance. Mapping your existing services to the CSDM makes sure you're using the right data model throughout your configuration. By doing so, you'll achieve the most value from the processes supporting services delivered through the Now Platform, including event management, request management, and other processes.

Best practice

Reduce redundancy in your existing services and, subsequently, your service catalog. As you design your configuration, use your current-state analysis to identify duplicative services and service offerings across your existing instances. If you find slight variations, consolidate them and add service offerings that will account for those differences. When you move to one system of action for your users, you'll need to design a service catalog that eliminates confusion and enables accuracy in your reporting. For example, consider a case where each of your existing service catalogs lists a MacBook Pro with varying configuration options. Instead of having two "MacBook Pro" listings in your catalog, consolidate them into one service and list the various configuration options under that service. Read our [playbook on designing a world-class service catalog](#) for additional guidance.

Best practice

Force a steering board review for any proposed customizations. The Now Platform offers significant flexibility for configuring the system to meet your business needs. In general, it is best to stay as close to out-of-the-box as possible since it will make scaling, maintaining, and upgrading your system much easier and less time consuming. There are times when custom development will be warranted since some out-of-the-box capabilities will limit you from achieving specific outcomes. If you find you do need to customize, weigh the costs and benefits with your demand board. Carefully consider if the business benefit of the customization outweighs the additional cost, considering both technical debt and the time required to upgrade.

"We had a standard rule. We're not going to make customizations. So, we're going to have to go out of the box."

– A ServiceNow healthcare customer

Best practice

Clearly articulate your design elements in either a process or design document. Process documentation should include roles and responsibilities, steps in a logical order (if applicable), and what the design element sets out to achieve. An outside stakeholder should be able to easily understand why something was configured the way it was, who is involved, and, for processes, what the steps are to execute the process from end to end. For data model configuration, you should be able to visually depict how tables and other items are related to each other and what business services they may impact. Services and service offerings should be documented in a way that provides visibility into the services you offer, to whom, and the value they might provide.

See Figure 6 for an example of a well-documented process tied back to an overall business objective.

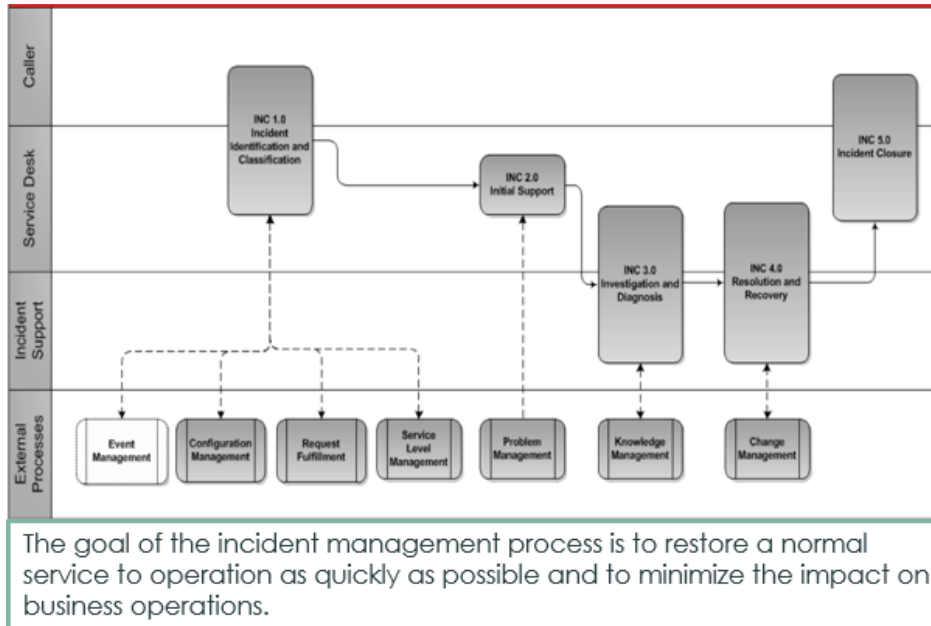


Figure 6: Example Incident Management process with clear roles, steps, and overarching goal

Best practice

Convert your design requirements into user stories that you'll use as a basis for development. The Agile methodology in [Step 2](#) depends on [user stories](#) that will fit into sprints. Each story should be a logical grouping of development tasks which will be built, tested, and deployed together. Each story should include three components: the persona, the action, and value proposition. Using the example in Figure 6, one story can be "As a Service Desk associate, I want to resolve my caller's incident so that they can return to business as usual and we minimize the impact on business operations."

Each process may have multiple stories, which will help chunk development work into manageable pieces. Work with your process owners, business analysts, and development resources to validate that the stories correctly represent your agreed-upon design. Then, assign points (that is, effort) to each story based on your internal guidelines. As part of backlog grooming, your development team will be able to plan and sequence which stories will be developed based on how much capacity your teams have and the relative priorities of stories based on their contribution to business objectives.

Note: You'll have an opportunity to revisit your platform configuration once you enter a stabilization period, generally three to six months after go-live. This means that you should be able to live with the configuration you design for your consolidated instance until at least

that time. Don't let being perfect be the enemy of being good as you build out your consolidated instance.

EXPERT TIP

Keep the user experience front and center as you design your consolidated instance. Strive to find opportunities for self-service to minimize the number of touches and time it takes to complete tasks and keep your design simple to make it quick and easy to navigate around the platform. Read our guidance on [designing an engaging self-service employee and customer experience](#) and [designing an optimal agent and rep experience](#) as you design your Now Platform.

What to do next

Coming out of Step 3, you've completed all the planning and design necessary to develop the configuration for your newly consolidated instance. Hand off your design documents to the members of your workstreams who will complete the configuration. Make sure that those who complete the configuration follow the guidance in [Step 2](#) for building, testing, and deploying based on the Agile methodology. In the meantime, you can focus on effective change management.

Your organization will likely want updates on your progress and will want to know how consolidation will affect individuals' roles and responsibilities. Consolidating your production instances in any context can bring significant change to your employees (and your customers if you use the system to interact with them). Throughout the program, communication and training are critical in helping users navigate change and drive strong adoption after your cutover.

Step 4 – Integrate your teams and prepare for go-live

KEY INSIGHTS

- Evaluate your pre-consolidation team structure and identify your post-consolidation requirements.
- Use the consolidation effort as an opportunity to rebrand your team and ServiceNow as a service.
- Make sure that users are properly trained to use the consolidated instance.

Regardless of your use case, consolidation is likely to impact the makeup of your platform team, the way your users interact with ServiceNow, and the way work is done in your organization. Effective [OCM](#) is key to keeping everyone engaged and prepared for these changes. Depending on your specific use case, some process users and/or end users may not be familiar with the Now Platform, specific modules or configurations within it, or your organization's operating model.

Your OCM workstream should start planning at the beginning of the consolidation program to prepare everyone for the consolidated instance and to drive adoption. Read our broader guidance on [creating a change management plan](#) on the Customer Success Center.

Action Step 1: Determine the size of your future platform team

Though possible, it's unlikely that the consolidated platform team will be equal to the sum of its original parts. Some of the goals of your use case likely include cost reduction and scale. You need to think about the roles and responsibilities on your platform team before consolidation and how they might evolve after consolidation.

INSIGHT 1:

Evaluate your pre-consolidation team structure and identify your post-consolidation requirements

Work with your executive steering board for your consolidation and cross-functional leaders (such as HR, shared services for ServiceNow, process managers, etc.) to evaluate your platform teams before consolidation. This includes assessing their [roles and responsibilities](#) and how they contribute to achieving your business outcomes. Consider the breadth of application and business knowledge that exists among your teams and what changes you might need to make in order to support your future-state architecture, operating model, and

any changed business and customer needs. You can use [Now Learning](#) and [Now Creators](#) to inform your evaluation in a standard way to make sure you have the appropriate skill sets. Roles to consider include business analysts, system administrators, application developers, platform architects, project and/or program managers, quality assurance and testing staff, and trainers.

Do you need a COEI?

This is a good time to consider [standing up a ServiceNow Center of Excellence and Innovation](#) (CoEI). A CoEI can help you realize and accelerate value realization across the enterprise by posturing ServiceNow as a core, strategic platform. Your ServiceNow CoEI can help in improving the scale and velocity of development teams, help business lines discover new opportunities for innovation, and set and oversee policies and processes that guard against technical risk. Work with your executive sponsor and strategic governance group to define a charter and structure for a CoEI before the consolidation program is over.

Like your configuration design, use your analysis to start planning your post-consolidation platform team. Your final team structure, including the number of individuals required to support the Now Platform, will depend on a few factors:

1. **The staffing model you choose to adopt** – This includes whether you have a dedicated or shared services model for the Now Platform (for example, are business analysts splitting time between ServiceNow and other work?), whether most of your employees are full-time or part-time, and whether these resources are sourced internally or outsourced to a partner.
2. **The number of applications that you've deployed** – Generally, the more applications you have deployed, the more people you'll need to support them.
3. **Your overall process maturity** – Less mature processes tend to require more time and effort to learn about and support. For instance, if your processes aren't well documented coming out of the instance consolidation, you might require additional business analysts to define and map processes in the future.
4. **The volume, diversity, and complexity of your platform demand** – As the use of ServiceNow applications expands, you may require additional staff. Consider factors such as the volume of transactions you expect to process, the number of process and end users you'll have and need to potentially train, the geographies you're supporting, and the business units supported. Also consider how many and the types of systems you need to integrate with ServiceNow, how much customization you need to support, and the pace of change or growth within your business. All these factors can contribute to increased demand and the resources you'll need to support the Now Platform.

Set your team and organization up for success by having the right technical, business, and operational knowledge and skills in place from the start. If this isn't possible within your program timelines, you may choose to augment staff with a partner during and immediately after the consolidation to minimize disruption. Make sure that you stay connected with your functional leaders and executive sponsor to design a team structure that delivers effective management of the Now Platform but also stays within the constraints of the consolidation use case. We recommend taking a conservative approach and maintaining your staffing until your stabilization period, typically three to six months after go-live.

Refer to the [Build an internal team of ServiceNow experts and train users](#) section of the Customer Success Center for more detailed information about building out your platform team.

Action Step 2: Prepare your team for go-live and post go-live stabilization

Each ServiceNow customer interviewed about their instance consolidation experience stressed the importance of communicating early and often throughout the consolidation program. As users navigate through change, they'll rely on you for information and support that enables them to complete their jobs and minimize disruption. Engage your marketing, HR, and training teams to partner on the overall communication strategy, branding of the new instance, and training rollout.

“Communicate, communicate, communicate. Not just an email.
How are you making sure the users are actually prepared?
Just overcommunicate in different ways...you can never go wrong with that.”

– A ServiceNow healthcare customer

INSIGHT 1:

Use the instance consolidation program as an opportunity to rebrand your team and ServiceNow as a service

As mentioned throughout, your instance consolidation program is a chance to hit the restart button on how you're using ServiceNow as a strategic platform. If you're going through a merger or acquisition, you're likely onboarding new groups of employees as well as new cultures, and biases about the way that work should be completed. The same can be said about consolidating instances within the same organization but different business lines, locations, or geographies. Regardless of your instance strategy, consider these best practices.

Best practice

Rename your Now Platform and/or URL and treat it like a brand that you want others to associate with. Depending on the circumstances of your instance consolidation, this sends a message of starting with something fresh that everyone can align with moving forward. It also reduces the perception that one group of users has been forced into an existing configuration. This is a no-brainer for a Greenfield approach but is also worth considering if you're assimilating one instance into the other.

Best practice

Create a new user portal that has a new look and feel aligned with your brand instead of reusing an existing one. This will make end users feel like they're all in it together, and that one legacy instance approach is not dominating the future experience. This is also an easy way to ease new users into an assimilated instance if they're apprehensive about changes.

Best practice

Partner with marketing and HR to create a campaign for the instance consolidation journey. Consider these simple ideas:

- A set of short videos outlining what's coming and how it will impact users
- Newsletters, posters, and emails that reflect any new branding and that direct users to more detailed status updates on the service portal
- Brown-bag sessions for the team to talk about the program and answer any questions users may have

INSIGHT 2:

Make sure that users are properly trained to use the consolidated instance

Conduct a change impact assessment to understand the extent that process and end users will undergo change as a result of the instance consolidation. If most of the processes in your consolidated instance are the same as in the legacy instance, you likely won't need much training. On the other hand, if you reconfigured processes, it's important to train process users and end users on these changes. This is especially important for capabilities and processes that are new to your process users. See Table 9 for the typical components of a change impact assessment. It is likely that you will have some sort of change impact assessment for each process user segment.

Attribute	Description
Gap between current and future state	What are the significant differences between the current and future state in terms of people, processes, and technology?
Scale of change	What is the scale of the change? Will it affect just one specific business line, the entire ServiceNow team, or the organization as a whole?
Type of impact	Is the change specific to people, process, technology, or the organization overall? This will affect whether you need to consider: resourcing or organizational structure; specific skills, knowledge, or behavior; additional technology requirements, etc.
Timing of impact	When will users be affected by the change?
Level of impact	To what extent will the change impact stakeholders or specific users? For example, are there new policies that require compliance?
Key risks	What are the risks of the change that could affect the overall program's success?
Roles affected	Which specific roles are affected?
Number affected	How many people, by role, are affected?
Communications requirements	What is the communication strategy for the change, if applicable?
Training requirements	What is the training strategy for the change, if applicable?
Leadership requirements	To what extent might leadership need to be involved with the change? This is applicable to large-scale changes that might have a heightened level of resistance.

Table 9: Change impact assessment structure

Refer to our resources on the Customer Success Center for [effectively training your users](#) to enable higher adoption and, ultimately, your business outcomes.

Consider the following best practices from our customers.

Best practice

To the extent possible, include end users and process users in user acceptance testing as you work through your configuration sprints. Not only will this help you start loosely training users early on, but it will also give you an opportunity to solicit feedback directly from the users who will be using the platform in the new way that it's configured. These users might suggest better or more efficient ways of completing work or might call out something that the primary project team and process owners weren't able to see since they may not use

ServiceNow as consistently. Including process users early on will also drive excitement and engagement, which will help you recognize the champions for your roll out.

“It really helped for us to have the authority of the users, and by that measure we had the backing of our leadership.”

– A ServiceNow customer

Best practice

Consider any training your customers may require resulting from the consolidation. If your customers interacted with your legacy instances and you intend for them to interact with your new instance, make sure to account for any changes to their experience and capture a training strategy for them within your broader training plan.

Best practice

To align materials to the production environment as closely as possible, don't create detailed training plans until at least 80% of the initially scoped configuration is complete. Start early by thinking about which users will require training and the best medium to deliver it based on your change impact assessment. Depending on your budget and the level of change, plan your training delivery medium(s), with as many in-person or live virtual events as possible. Detailed planning around your curriculum can follow once your post-consolidation configurations are finalized.

Best practice

Uplift users who are lagging in skills as a result of the consolidation. Since you're combining different processes and ways of doing work, it's possible that users will have varying levels of familiarity and skills with certain capabilities or processes. For example, one group of users may have used Predictive Intelligence capabilities in the past, but this capability is new to process users assimilating into that instance.

Conduct in-person workshops to train targeted segments on the end-to-end process in a live training environment if possible. Give users the opportunity to view demos, practice hypothetical scenarios in a training environment, and ask questions. Make sure to supplement this training with knowledge articles in case process users need additional support.

INSIGHT 3:

© 2020 ServiceNow, Inc. All rights reserved.

48

Have a feedback loop in place for users and be ready to act on it

Creating a feedback loop will keep your users engaged, drive adoption, and help to accelerate your business outcomes. Users like to be heard and feel as if they have an input into the design and roll out of any new technology or process. They'll also be the first to voice any issues or inefficiencies. Have a system in place to both enable feedback and act on it, especially during the first few weeks of go-live on the new instance. Easy, low-effort ways to solicit feedback include:

- Using the [Surveys and Assessments](#) tool in the platform
- Soliciting feedback via email, newsletters, townhalls, etc.
- Holding occasional drop-in sessions specifically designed for users to ask questions and offer suggestions

Incorporate the feedback into your program and find opportunities to demonstrate to the individuals or groups submitting it that you used their feedback to inform the change.

Our customers identified the following best practice.

Best practice

During the first month of go-live, consider increasing your release schedule for any bugs or minor changes to every day or every other day. For things that are easy to change, such as adjusting the names of fields or adding simple fields, release them as soon as possible after you receive feedback—this builds your users' confidence that your consolidation team is actively listening and responding to them.

“We were informed that something wasn't working right, and we would fix it that day. We suspended a normal process and did daily code releases as appropriate. It made them feel like, Oh, they're listening, and I can change things so I'm not locked in. The responsiveness was a big thing to win over people.”

– A ServiceNow customer

What to do next

The initial consolidation program will be considered complete once the legacy systems are deprecated and all users are onboarded to and have adopted the processes in the consolidated instance. Revisit your initial business outcomes across the year following go-live to make sure that you're meeting your planned objectives. Work with your account executive and other members of the ServiceNow team to understand the impact of the consolidation on your business goals and where you have opportunities to improve.

Despite completing the initial work, it's likely that you'll add more functionality to your ServiceNow ecosystem that's aligned with the vision you established in [Step 1](#). It's also possible that some users will take longer to move along the change curve and will require additional support and training. Work with your platform team to develop a continuous improvement plan and ongoing change management activities that continue to drive adoption and help you transform your business.

“Socialization is not one and done. We want to look for patterns of behavior and for opportunities to improve. You've got to show the value, you've got to get people bought in. Don't think because you said something once you'll get people on board.”

– A Fortune 500 ServiceNow customer

The takeaway

Your consolidation program is an opportunity to rethink the way that you use the Now Platform to achieve your business outcomes, support visibility across workflows, and minimize technical debt. A consolidated instance footprint will give you a holistic view of your business and help you fully realize the platform's potential to help you achieve your strategic objectives.

As you design your consolidated instances, keep the voice of your customers, process users, and end users front and center to deliver a user experience that drives simplicity, efficiency, and scalability in the long run. Strive to foster collaboration across your consolidated platform team and maintain a continuous improvement mindset once your initial consolidation is complete.

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

Good – You've consolidated your instances and onboarded users but have some technical debt, an immature data model, and/or redundancy in services or processes resulting from the consolidation. You haven't deprecated your legacy system(s) or executed on your data retention strategy but intend to do so within the next year. You've achieved most of your consolidation business outcomes.

Better – You've consolidated your instances and onboarded users, eliminated most or all technical debt and reduced redundancy across legacy systems, and redesigned some of your configuration to improve the user experience. You've deprecated your legacy system(s) or have a plan to do so within the next six months, considering your data retention strategy. You've achieved most of your consolidation business outcomes and have a plan in place for continuous improvement.

Best – You've consolidated your instances and onboarded users, have a business-smart approach to customization that eliminates nearly all technical debt, and have no redundancy in your processes, data model, or services. You've approached design with user experience at the forefront and process and end users are empowered to influence the roadmap moving forward. You've successfully deprecated your legacy systems and have the right level of access to your legacy data. You've achieved nearly all your consolidation business outcomes and have a continuous improvement program in place.

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.