

Design a world-class service catalog

Create a process to continuously optimize customer experience and provisioning efficiency

What's in this Success Playbook

This Success Guide will help you create a world-class service catalog design, governance, and maintenance process that:

- Optimizes customer experience and process efficiency
- Builds a robust catalog structure to improve search and set the right expectations
- Streamlines fulfillment workflows for faster delivery time and issue diagnosis
- Provides flexibility to make changes to the catalog for relevance
- Defines the right measures of success and predictive metrics to identify performance gaps

Key takeaways

The most important things to know

- Creating a world-class service catalog—one that continuously optimizes customer experience and provisioning efficiency—is not a one-time effort. Changing customer and business needs means that even the best service catalogs need to be frequently redesigned or updated, which can be costly and time consuming.
- You must have a design, governance, and maintenance process that focuses on ongoing customer needs assessment, flexibility so you can make on-demand changes to the services you offer, and proactive performance improvement so you can improve value for cost.

The payoff of getting this right

A world-class service catalog design process should improve both customer experience and the efficiency of your provisioning processes.

What you need to get started

Leadership support

Find an executive sponsor to support and be part of your service catalog design team.

Playbook overview

Follow these stages to plan your catalog design, create a customer-focused catalog structure, remove redundancies in your fulfillment workflows, and define a catalog maintenance process:

Stage 1 – Plan for the catalog design process

Stage 2 – Create the top-level catalog structure

Stage 3 – Simplify and standardize fulfillment workflows

Stage 4 – Define the catalog design maintenance process

Terms and definitions

Service Catalog – The ServiceNow® Service Catalog provides a structured and consumable view of available services and offerings managed by an organization (it could be IT services or shared services such as HR, facilities, finance, etc.). It helps manage what services a user has access to and is the entry point for users to request products and services (exposed as catalog items) from the organization.

Note: A service catalog can have multiple different views (e.g., IT services, business services, or IT operations) based on its audience. In this document, we refer to the end user (one who places a service request) view of the catalog, such as the users of an IT request catalog.

Catalog item – A catalog item is a requestable item within the catalog.

Service owner – Service owners are responsible for the smooth end-to-end execution and experience of the service they own. They're accountable for designing, building, pricing, and enhancing the service as well as service delivery and cost recovery. The service owner also works with business leaders to collate business needs and with architects, technology brokers, and external providers to select and implement the underlying processes.

Bundles – A group of catalog items that are usually requested together to meet a defined business or customer need. The catalog items requested within a bundle can cut across categories within the catalog and are often fulfilled by different functions across the organization. You can create bundles with the ServiceNow Service Catalog using [order guides](#).

Workflow tasks – Workflow tasks are activities, such as "place a procurement order for new laptop," that need to be completed to fulfill a catalog item request.

Net Promoter Score – The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. It's used as a proxy for gauging the customer's overall satisfaction with a company's product or service.

and the customer's loyalty to the brand. (Source: <https://www.medallia.com/net-promoter-score/>)

Customer Effort Score – The Customer Effort Scale indicates the measure of effort your customers put toward getting their needs fulfilled. The measurement is made by asking a simple question: “How much effort did you personally have to put forth to handle your request?” Users score their answers on a scale from 1 (very low effort) to 5 (very high effort).

Service process users— These are customer support agents, service desk staff, and service representatives who rely on the Now Platform to execute and manage their fulfillment work processes, tasks, records, and reports.

Stage 1 – Plan for the catalog design process

Set your catalog up to succeed with a process plan and a team with clearly defined roles.

KEY INSIGHTS

- Clarify your catalog design team's roles and responsibilities.
- Define clear measures of success for your service catalog design.
- Plan an incremental approach to scale your service catalog design deployment.

Organizations typically have aggressive targets for their service catalog deployment, but they under invest in creating a process to inform service catalog design and maintenance decisions. Without a planned process, service catalog design quickly fails to meet its intended objectives.

Instead, create a process plan that shows a clear understanding of:

- Who needs to be on the design team
- The barriers to creating a better experience and efficiency that the new service catalog needs to solve for
- Where to first apply the new design
- How to scale the new design

Create a service catalog design team with clear roles and responsibilities

An important first step in creating a governance plan is to clarify the roles and responsibilities required for good service catalog design. Too often, we find catalog managers working independently with the ServiceNow system administrator to design the catalog customer experience, its structure, and underlying workflows.

But keep in mind that catalog managers by themselves may not have the business context to understand your customer needs or the process design expertise to create efficient workflows. This leaves you with a catalog that's not optimized for superior experience and efficiency.

Instead, create a design team that includes these four roles:

- 1. Service owner(s) for business expertise** – Service owners are, effectively, the general managers of the services you provide. They should have the best end-to-end view of customer needs, customer request patterns, and the fulfillment process of delivering on customer requests. They play a critical role in defining the items you need in the catalog,

providing the right information associated with each catalog item, and making sure that catalog items are relevant to individual customer needs.

2. **Solution architect(s) for process design expertise** – Creating a workflow on the Now Platform™ is easy, but the workflow's value depends on how effectively its underlying logic minimizes redundancies. Solution architects or similar process experts (like business analysts) are experts in process design.
3. **UX designer(s) for customer experience design expertise** – Good user experience (UX) design requires an end-to-end understanding of the customer journey and needs, with the help of targeted surveys, interviews, or even focus groups.
4. **The catalog manager for overall process management** – The catalog manager's role is similar to a program manager's—they coordinate with different stakeholders to make prioritization decisions, define processes to maintain and scale the catalog, and track the right metrics to identify performance gaps.

Apart from the catalog manager, none of the other roles need to be full time. Think of these as different “thinking caps” that need to come together to design the service catalog. See Figure 1 for more on the service catalog design team roles and their individual and joint responsibilities.

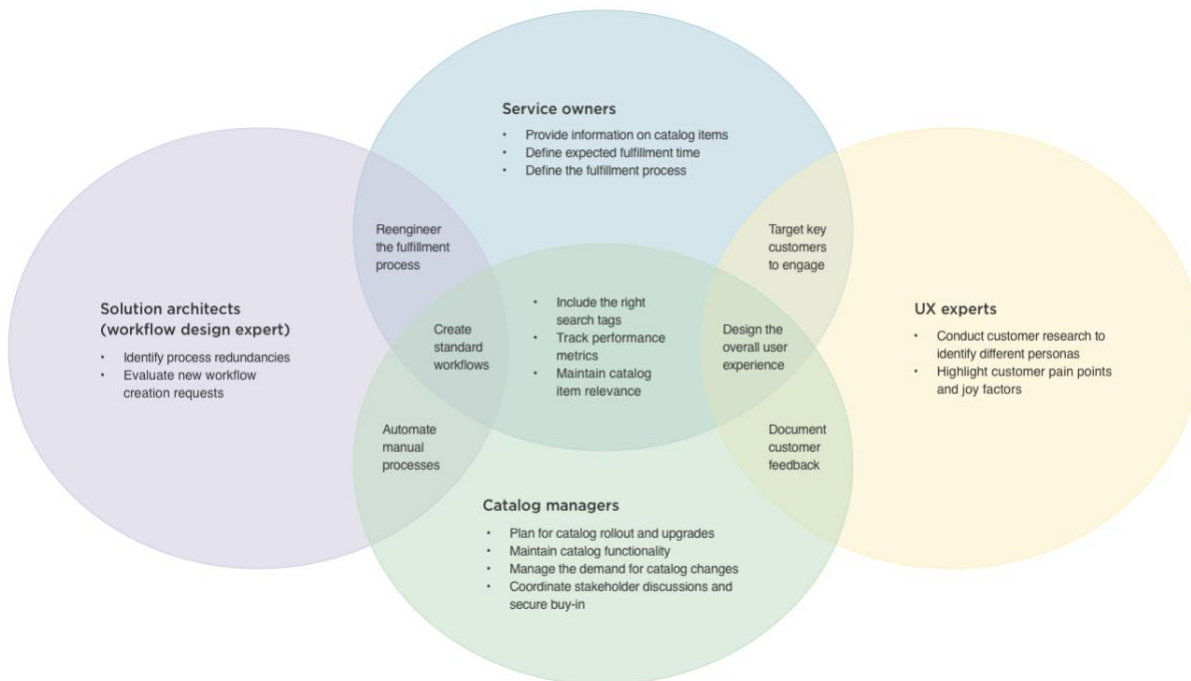


Figure 1: Service catalog design team roles and responsibilities

Keep in mind that the design team members may not have equal rights to make changes directly to the ServiceNow Service Catalog application. The system administrator on your team must carefully assign and monitor edit rights based on organizational context.

At ServiceNow, we typically recommend creating three levels of editing rights:

- **Catalog administrator** – Can manage the Service Catalog application, including catalogs, categories, and items and has overall administrative privileges to the Service Catalog app and all the catalogs defined within it
- **Catalog manager** – Can edit and update a service catalog, as well as the categories and catalog items within the catalog; can assign editors and a different manager for the service catalog
- **Catalog editor** – Can edit and update a service catalog, including its categories and catalog items; can assign other editors but cannot change the catalog manager expectations with customers.

Define the measures of success for your service catalog

The ideal service request catalog provides a great, effortless experience for its customers and helps improve provisioning processes for efficiency. Unfortunately, there are number of different barriers that hinder the catalog's ability to deliver on this objective.

On the other hand, view every upgrade as an opportunity to identify these barriers and remove them to improve your service catalog design. The upgrade is your chance to revisit your service catalog's value proposition.

So start fresh by asking a few questions to understand the key measures of success for your new catalog rather than building on your existing catalog functionality. Who are your service request catalog's customers? The customers of your service request catalog fall into three groups: end users, service process users, and support reps:

- **End users (internal employees or customers)** – These are your primary customers of the service catalog. They log on to the catalog (or the portal) for their day-to-day needs. Their needs and expectations vary based on their different personas and roles.
- **Service process users** – The process users rely on the catalog to get key information on customer requests, to ensure the correct team receives the requests, and to set the right fulfillment expectations with customers.
- **Support representatives** – Support reps are an important set of customers for your service request catalog as well. End users often reach out directly to support reps for their needs, and it's the support rep who logs customer requests into the catalog or uses the catalog to track requests or answer customer questions.

Instead of skewing the design toward end users or process users only, equally consider the perspective of all three customer groups for your catalog design.

What are your customers' needs, pain points, and delight factors?

To understand customer needs and pain points, try [getting into your customer shoes to empathize](#) with their experiences. We recommend conducting in-depth user studies—in the form

of interviews, surveys, or focus groups—with all three customer groups to dive deeper into their experiences and needs. Focus not just on their pain points but also on what they like about their current method of placing service requests.

Use Table 1 as a framework to document your findings.

Consumer group	Needs	Pain points	Delight factors
End user	<ul style="list-style-type: none"> • An effortless way to make and track requests • Faster and transparent resolution • Decision-making support • Portal consolidation • Effective search 	<ul style="list-style-type: none"> • Can't find what I'm looking for • No visibility into when my request will be completed • Hard to choose among the options available • Too many different catalogs 	<ul style="list-style-type: none"> • Service owner name is available to contact for more information • Can compare multiple choices in one page
Service fulfiller	<ul style="list-style-type: none"> • An easy way to track requests, including who is working on it and which team • A one-stop shop for all information on all customer request types 	<ul style="list-style-type: none"> • Too many manual processes • Hand-offs are not clean 	<ul style="list-style-type: none"> • Catalog captures the required customer data
Support rep	<ul style="list-style-type: none"> • An easy way to log and track repeated requests • A one-stop shop for all information on all customer request types 	<ul style="list-style-type: none"> • Categories are confusing • No visibility on progress made • No info on customer FAQs 	<ul style="list-style-type: none"> • Service owner name is available for more information

Table 1: Framework for documenting customer feedback (shown with examples)

Note: As part of the design team, the catalog manager must work with the service owners and in-house UX experts to identify and document customer needs (see Figure 1 for more details). The service owners have a deep understanding of their customers and are best suited to identify whom to engage to conduct user studies. And UX experts are best suited for conducting these studies and coming up with actionable recommendations.

What measures of success would help track the catalog's ability to meet customer needs and create greater efficiency?

When you understand your customers' needs and pain points—from the perspective of end users, service process users, and support reps—you can identify the barriers between you and superior customer experience and an efficient catalog. Your design objective is to remove these barriers. Many organizations understand this and define clear design objectives. This puts you on the right path, but you must always define the measures of success associated with those objectives as well.

Create a set of quantifiable measures of success that you can track regularly to highlight trends and gaps in your catalog performance. These measures of success serve as triggers for the design team to make corrections—and progress—toward your long-term catalog vision and goals.

There are two catalog goals you should definitely include (but feel free to tailor them to meet your business and customer needs): an effortless UX and provisioning efficiency.

Effortless customer experience design objectives

- **Make the catalog a one-stop shop for all customer requests**
 - *Measure of success* – All service requests are offered through the catalog
- **Improve search**
 - *Measure of success* – Low Customer Effort Score
- **Clarify delivery expectations**
 - *Measure of success* – Reduced support calls for information and updates on requests made
- **Improve experience**
 - *Measure of success* – High Net Promoter Score (NPS)

Provisioning efficiency design objectives

- **Increase self-service**
 - *Measures of success* – Increased call deflection; reduced cost per request
- **Streamline processes**
 - *Measures of success* – Faster time to provision; faster issue diagnosis
- **Improve predictability**
 - *Measures of success* – Reduction in manual steps or touchpoints; majority of requests fulfilled within expected SLAs
- **Consolidate tools**
 - *Measure of success* – All requests and services are tracked and fulfilled through the catalog

EXPERT TIP

To secure senior management buy-in on the objectives identified for your service catalog design, highlight how these objectives help managers see the expected value from their Now Platform investment. With senior management buy-in, it's easier to build stakeholder consensus and scale the catalog across the organization to deliver on these objectives.

Create a plan to incrementally apply the new design on catalog items

Taking a big bang approach to the design of the entire service catalog is ambitious. However, it can take months to get everyone's buy-in on the new design and process the multiple quality and technical issues that pop up (especially if your design is not well tested before delivery). When you use a big bang approach, you often miss opportunities to collect and act on the lessons you would otherwise learn by following a more iterative approach.

Instead, prioritize catalog items based on their value (for the business and customers) and their fulfillment process complexity. Apply the new catalog design incrementally to create a design process focused on continuous improvement.

Use this three-phase plan to scale your catalog design.

Design phase 1 – Set fundamental design principles and deliver with a small set of high-value, low-complexity catalog items

- Create the fundamental service catalog design principles: a toplevel structure and fulfillment workflow standards (see Stage 2 and Stage 3).
- Prioritize high-value, low-complexity catalog items to validate and test the new design.

Design phase 2 – Refine the design with lessons learned and extend it to other high-value catalog items

- Incorporate lessons learned and customer feedback in the design process.
- Extend the catalog design to high-complexity, high-value catalog items.
- Simplify the process for service providers to maintain and update catalog items (see Stage 4).

Design phase 3 – Ensure everything in the catalog follows the new design principles, and formalize governance and maintenance for continuous improvement

- Create a continuous improvement process to proactively upgrade the catalog design based on lessons learned and customer feedback.
- Define processes to evaluate and incorporate nonstandard business requests into the existing functionality (see Stage 3).

- Formalize and document the design process to help service process users and service consumers adopt the new design.

As a rule of thumb, prioritize your catalog items with the highest transaction volume and the least complex fulfillment process for design phase 1. But first, categorize the catalog items for prioritization based on a comprehensive assessment of their underlying value (both from the end user's and the provider's perspective) and fulfillment complexity. Figure 2 shows some common catalog item categories and how you might prioritize them.

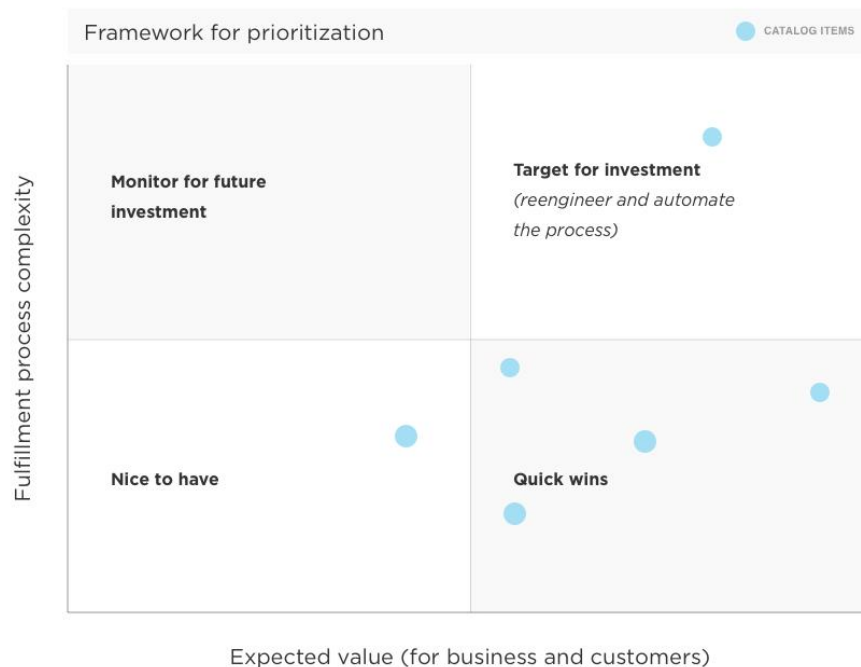


Figure 2: A 2X2 categorization matrix for visually prioritizing catalog items

Instead of including all high-value catalog items for design, prioritize them under the “quick wins” category—these are your low-complexity and high-value items. Demonstrate the value of the new design through these catalog items, solicit feedback and lessons learned, and only then scale them to other high-value, high-complexity catalog items.

For catalog items in the “target for investment category,” which are your high-complexity, high-value items, look for ways you can simplify or automate the process to minimize its complexity before you apply the new design. Deprioritize all other catalog items until the new catalog design is stable and well tested.

To assess the value and complexity associated with a catalog item, identify a comprehensive set of factors based on the item's value and complexity, and then score them consistently across all your catalog items and stakeholder groups. Table 2 shows an example scorecard (next page).

Expected value for creating workflows associated with a catalog item		
Factors that drive value	Description	Scoring scale (Example)
Transaction volume	Volume of requests received per week	<ul style="list-style-type: none"> 1-Low: <3 requests/week 2-Medium: 3–10 requests/week 3-High: 10+ requests/week
Number of customers impacted	Number of customers who frequently request the catalog item	<ul style="list-style-type: none"> 1-Low: <40% (or no group/function-level impact) 2-Medium: 40%–60% (or group/function-level impact) 3-High: 70%+ (or enterprise-level impact)
Time to fulfillment improvement	Taken from the time the request is placed to when it is fulfilled	<ul style="list-style-type: none"> 1-Low: No change 2-Medium: Small improvement 3-High: Significant improvement
Cost savings per request	Cost savings in terms of time and effort if moved to new design	<ul style="list-style-type: none"> 1-Low: <\$5 2-Medium: \$5–\$10 3-High: \$10+
Customer effort improvement	Expected change in customer's perception of how hassle-free it was to get what they needed	<ul style="list-style-type: none"> 1-Low: No change 2-Medium: Small improvement 3-High: Significant improvement
Overall expected value (average value)		
Complexity associated with creating a workflow for a catalog item		
Factors that drive value	Description	Scoring scale (Example)
Risk	Highlights any sort of risk associated with the fulfillment workflow including security, data integration, regulation, compliance, and information privacy concerns	<ul style="list-style-type: none"> 1-Low 2-Medium 3-High
Interdependencies with other applications	Highlights the number of multiple different applications or databases the fulfillment workflow touches to resolve the request	<ul style="list-style-type: none"> 1-Low 2-Medium 3-High
User input requirements	Captures the volume of information or data the user needs to provide to fulfill the request	<ul style="list-style-type: none"> 1-Low 2-Medium 3-High
Number of approvals needed	Highlights the number of approvals that require human oversight to process	<ul style="list-style-type: none"> 1-Low: 0–2 approvals 2-Medium: 3–5 approvals 3-High: 5+ approvals
Overall complexity score (average value)		

Table 2: A scorecard example to measure the value and complexity associated with creating a workflow for a catalog item

For more information on evaluating self-service use cases, and for a similar score card, read our best practice guide on [improving self-service](#).

Note: When you take an incremental approach, it doesn't necessarily mean customers have to log on to two separate platforms for similar requests (for example, using two platforms to request a new PC and to request a corporate phone line). This is not a great customer experience. Instead, include all catalog items in the customer-facing view (i.e., the [Service Portal](#)) of the

catalog and maintain the legacy request management approach for back-end catalog items that don't have the new design applied to them yet. You can do this easily using an execution plan instead of creating sophisticated workflows.

Stage 2 – Create the top-level catalog structure

Your catalog structure can create your service catalog's success or failure. Make sure your design sets you up for success.

KEY INSIGHTS

- Aim for six to ten top-level customerdriven categories that cover most requests.
- Offer bundles for end-to-end use cases that align with a specific business outcome.
- Improve search with metatags and naming conventions using customer language
- Guide users to help them make the right choices and build transparency.

Identifying the right set of categories at the right level is a big pain point in service catalog design. Many organizations struggle with either too many categories—often as many as 100—or with too many levels in the catalog hierarchy. Search and navigation are ineffective without intuitive categories to filter search results and terminology in natural customer language.

Many organizations also don't realize that the goal of the service catalog is to drive informed decision-making on what to request not simply provide a list of things customers can request.

Your service catalog request structure must:

- Be easy to navigate
- Use simple, customer-focused language
- Include the information that drives decision-making and builds transparency

Identify six to ten top-level categories

When we walk into a grocery store, the aisles are arranged based on how we think about (or categorize) our needs. They're not arranged by where the goods come from—even though it might be easier for the grocer to store and track goods based on the supplier. As a customer, it would be a lot harder for us to find things we need if the aisles were arranged based on the supplier. We would need to remember the supplier for each item and keep switching between the different suppliers to compare items.

The same logic works with the categories in a service request catalog. Many organizations create categories based on the different teams, groups, or functions that fulfill or own the service request. This leads to categories that don't necessarily make sense to the customer and make it harder to scale the catalog.

Instead, create six to ten top-level categories based on how your customers think of their needs.

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Use this common set of categories that typically apply to all organizations (not including HR) to get started:

- **Hardware** – Requests for hardware products that meet your business needs, including phones, tablets, and laptops
- **Software** – Requests for the range of software products available for installation on corporate laptops or desktops
- **Business applications** – Requests for support and management for in-house or third-party business applications, not including desktop or other personal productivity applications
- **Communications** – Requests for services aimed at facilitating communications between employees and customers or other employees, such as telecommunications, email, Slack, Jabber, groupware, etc.
- **IT infrastructure** – Hosting service requests for servers, applications, or other forms of compute infrastructure, including requests for shared technologies that underlie other services, like network, storage, global backup and recovery, and data archiving
- **Facilities** – Facilities management service requests, including moving and relocation, location improvement, new furniture, furniture repairs, fixtures, cubicle modifications, and decorative services, on a companywide basis
- **Office** – Requests for office services, such as printers, printing services, office supplies, and document shipping and delivery
- **Security and access** – Requests for security-related services, including badge and key requisitions

This basic set of categories probably looks very similar to the actual items your customers can request from your organization. In addition, you can also expect to have some categories specific to your organization, or you might have specific catalog items called out at the category level based on demand or transaction volume. You may also want to tailor or change the catalog items highlighted at the category level based on changing user needs, changing business context (like a service promotion campaign), or to personalize the experience for individual user groups.

For more details on editing and maintaining catalog categories, refer to the NowSupport video on [creating Service Catalog categories](#).

Define a three-step catalog hierarchy

After you have the top-level categories defined, define the right depth in each category. Once again, having six to ten subcategories under each top-level category is ideal.

Heads up!

Aim for no more than a three-step hierarchy: top-level category > subcategory > catalog item.

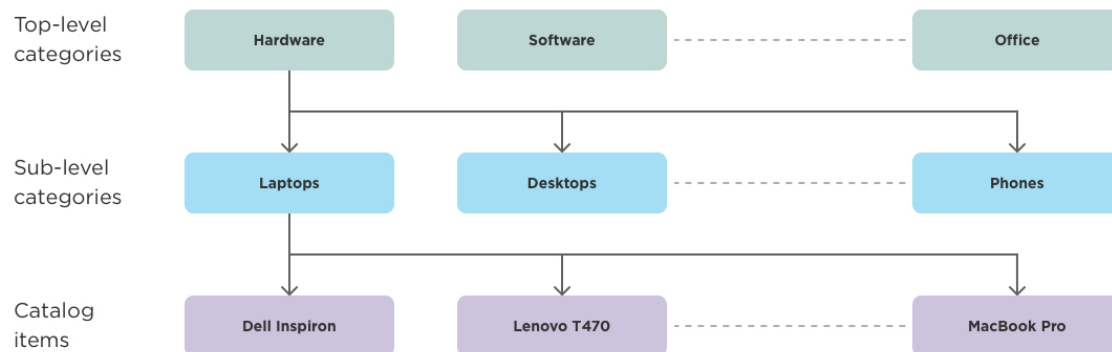


Figure 3: Example of a three-step Service Catalog hierarchy structure

Here are the common questions we get from customers and our take on the associated best practices:

- **How many catalog items should my catalog have?** It's not a question of how many. Instead of thinking about your volume, be conservative in the number of categories you use (no more than ten). And ensure you have no more than three steps to an individual catalog item's hierarchy. You can even have 1,000 catalog items (based on the three-step hierarchy structure, that's 10X10X10) if you categorize them well.
- **Can we place a catalog item in multiple categories?** Yes, you can. Your goal is to make it easy for customers to reach the catalog item, and different customers may have different paths to reach the same catalog item.
- **Should we create separate catalog items for the different options possible within a request?** Avoid creating multiple, similar catalog items. Instead, build flexibility within the catalog item to allow users to pick between multiple options (such as different laptop configurations) within the request form. Use [Service Catalog variable question choices](#) to develop that flexibility.
- **What should we do with catalog items that don't fit in any top-level categories?** For catalog items that don't logically align with any top-level category, create an "other" category.
- **How many data fields should my catalog items have?** It depends on what you need to capture and why. Never ask for information that you don't really need to approve and fulfill the request.

Create bundles that address end-to-end customer outcomes

Customers are often looking for a specific outcome with needs that require multiple catalog items and coordination between multiple fulfillment teams. For example, a manager looking for a new-hire onboarding package or an application developer looking to set up a new server may require coordination from different teams to deliver.

For new-hire onboarding, the hardware team provides all the required hardware, the software team adds all the applications, the learning and development team builds a queue of required courses, and so on.

To set up a new server, the infrastructure team configures the server, the security team provides access authentication, and the applications team configures the right integrations.

To ease the process of creating these requests, create “bundles” that align with end-to-end use cases or outcomes that customers are trying to achieve. Each bundle will trigger requests for multiple catalog items scoped within the desired use case. The [ServiceNow OrderGuide API](#) will help you create such bundles for your service request catalog.

COMMON SERVICE REQUEST BUNDLES INCLUDE:

- Remote office setup
 - New-hire onboarding
 - New server request
-

Tailor your terminology to incorporate customer language

When customers look for catalog items, most prefer to use search over browsing through lists to find what they want. Many organizations do offer advanced search functionality, yet their customers still struggle to find what they need in the service catalog. Often the root cause is the IT-centric terminology they use to name and describe their categories or catalog items.

Instead, take a focus group approach to work directly with customers and come up with the right terminology for the categories in your service catalog. Also, identify the different terms that different customers use to refer to a given catalog item or category. You must use those terms to [configure key word search for catalog items](#) especially with the help of the right meta tags.

To create effective focus groups:

- Create multiple small focus groups—max 10 people per group.
- Include representatives from different customer groups, including different personas, functions, and geographies.
- Include representatives from all customer types—end users, service process users, and support desk representatives.

Some customers conduct card-sorting exercises to receive unbiased feedback from customers on their preferred language.

Conduct a card-sorting exercise

1. Provide a set of index cards with suggested categories to each participant.
2. Show the participants a list of existing catalog items and ask them to assign, add, delete, and change the categories individually, based on what makes most sense to them.
3. Consolidate the findings. Most likely everyone will have different interpretations of the categories.
4. Create new categories and meta tags based on:
 - Qualitative information based on user comments
 - Quantitative information based on cards that appeared together most often and how

Heads up!

Don't just engage with customers in the beginning to understand their terminology. Instead, engage with customers in small, diverse groups on a regular basis to continuously improve the terminology you use in the catalog.

Include the right information in the catalog to inform decision-making and build transparency

The service catalog is not just a menu of different items customers can request. It must include all the information customers need to make informed choices.

Many calls to the support desk are from customers requesting product information and updates on existing requests they've already placed through the catalog. On consumer websites, organizations provide details, like product comparisons to other options and delivery information, with transparency into shipment tracking. Learn from them: Aim to build similar decision-making support and transparency for the requests your customers make. This will help reduce the number of support calls customers make just to get a status update on their requests.

Include this information in your service catalog for decision-making support and transparency:

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- A definition of the service that corresponds to the catalog item—what it is and what it helps accomplish
- A clear explanation of what is included in the service
- Pricing information (actual value or high, medium, or low)
- Delivery time expectations
- The approval process requirements
- The name of the fulfillment owner (requires additional configuration)
- Comparison with other similar options available (Include it as part of your item description so users are less tempted to customize over using something out of the box.)

Not all information is relevant, or accurate, for all kinds of users. Many organizations provide different offerings to different users based on their geographic locations or the functions they perform. We recommend using the ServiceNow [user criteria](#) feature to tailor the information you provide to users. But don't over complicate authentications. Instead, consider defining user criteria only at the top level either based on geographies or functions like IT, finance, etc.

EXPERT TIP

Strike for the right level of information depth. Too much information can overwhelm customers and hinder their decision-making. For example, pricing shown as high, medium, or low may make more sense than actual values.

Stage 3 – Simplify and standardize fulfillment workflows

When your workflows are standardized, your users can more easily track their progress. Keep these workflows simple so everyone benefits.

KEY INSIGHTS

- Design fulfillment workflows with a threefold approach—standardize, simplify, and automate.
- Define fulfillment stages, and their expectations, that are meaningful for the user.
- Create a rigorous process to handle exceptions.

The advantage of implementing the ServiceNow Service Catalog is that you can create multiple workflows that streamline and automate a sophisticated fulfillment process. But be cautious when you create new workflows—your design can quickly become too complex to manage.

Many organizations create a separate workflow for almost every catalog item. In the hurry to meet their go-live deadlines, they don't really re-engineer their existing workflows to simplify or even clarify the fulfillment process. Because of this, they can struggle to maintain their catalog or pinpoint the challenges in their fulfillment process.

Many catalog items have similar fulfillment processes. Instead of reinventing the wheel each time, design standard service request fulfillment workflows you can reuse for multiple catalog items.

Focus on:

- Removing redundancies
- Automating administrative manual processes
- Creating meaningful fulfillment stages
- Enforcing good workflow design discipline with your process users

Note: Re-engineering the fulfillment process and designing a standard workflow requires deep process design experience. Your team's catalog manager and service owners should consult with the solution architects (in-house or external) to design lean processes before you convert them into standard workflows.

Create a minimal, standard set of reusable workflows

Keep the number of request approvals and fulfillment workflows to a minimum. With too many workflows, it can become extremely difficult to diagnose problems and maintain a streamlined experience for both customers and process users. While a few of our customers have gone to the extent of having a single workflow for all their catalog items, we recommend aiming for a set of three standard workflows: small, medium, and large.

Follow these steps to create a standard set of reusable workflows.

Step 1: Map out and identify redundancies in the fulfillment process for all existing catalog items

Your team's catalog manager must run a workshop with the service owners and solution architects (or workflow designers) to:

1. Map out the fulfillment process for all existing catalog items
2. Use these questions to identify the redundancies and complications in your existing fulfillment processes (This won't be a comprehensive list, but is a good starting point):
 - Which approval requests have an almost 100% approval rate?
 - What's the impact of eliminating individual approval stages?
 - How many times does a team hand off each request?
 - What role does each team play in fulfilling the request? Are any roles unnecessary?

Eliminate all redundant activities in the fulfillment process identified through this exercise.

Note: Eliminating steps will require buy-in from the service owners and process users.

Step 2: Build a simple, high-level, standard view of the fulfillment processes

Not all catalog items have a unique fulfillment process, and they shouldn't. The team's solution architect must work with the service owners to build a standard high-level view of the catalog items' fulfillment processes. The ServiceNow best practice is to create three levels—small, medium, and large—of the fulfillment processes based on the number of approvals and fulfillment steps required. Figure 4 shows an example.

Small (or level 1) fulfillment process
(For example, a preapproved software installation)



Medium (or level 2) fulfillment process
(For example, a new laptop)



Large (or level 3) fulfillment process
(For example, a new corporate mailbox with multiple owners)



Figure 4: High-level view of standard fulfillment processes

In Figure 4, the small fulfillment process example is for catalog items that don't need any approvals to execute. As we go a level up, the number of approvals and number of fulfillment tasks keeps increasing. The large fulfillment process requires a matrix of approvals from the user side (manager and above) and the control group (the one that makes sure the request doesn't pose any security risks or break any organizational policy) before initiating the fulfillment tasks, which may involve coordinating with multiple different teams.

Note: Design these standard, high-level fulfillment processes based on your business processes. Figure 4 is just an example to illustrate increasing size and complexity.

Step 3: Map out the exact fulfillment process flow and roles involved for each level

For each of these fulfillment processes, map out the teams or roles involved, along with the overarching process flow. See Figure 5 for an example with a medium-level (or level 2) fulfillment process (next page).

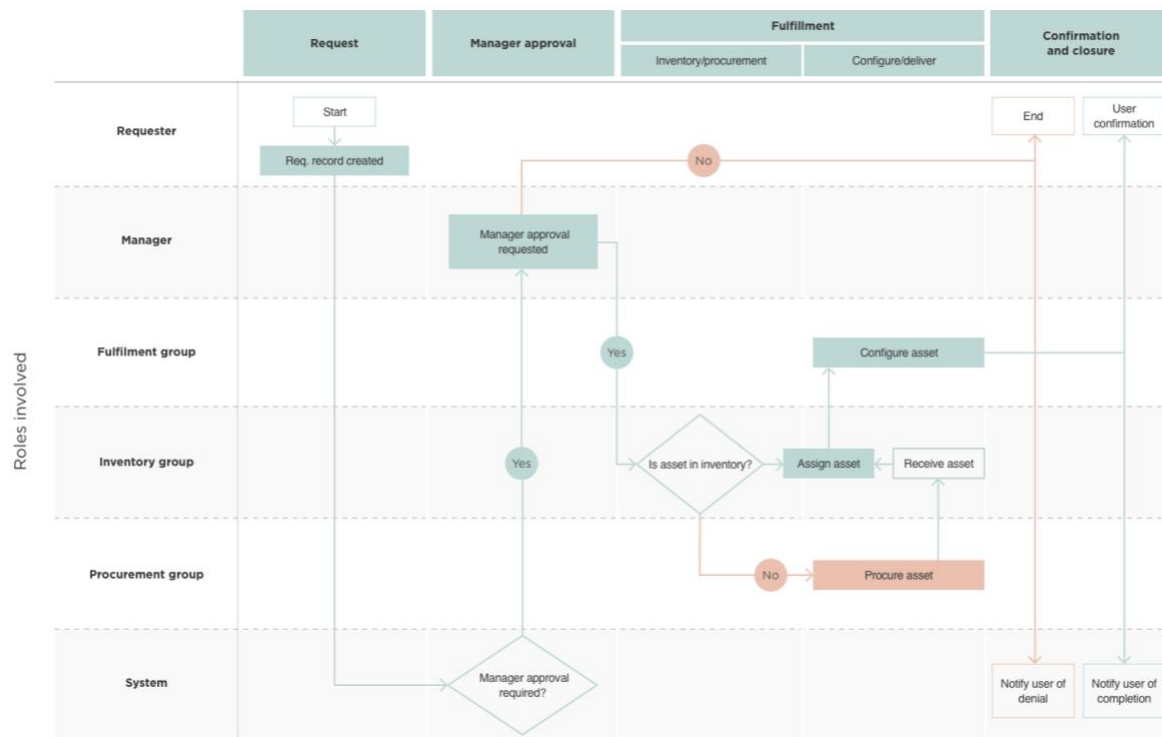


Figure 5: Example fulfillment process flow and roles involved

EXPERT TIP

Tie stage-level delivery targets to SLAs and OLAs to help you make prioritization decisions.

Step 4: Create standard workflows associated with each fulfillment process level

Once you have a simple, lean process flow defined for all fulfillment process levels, design standard workflows—small, medium, and large—in the Service Catalog application. Ensure the specific details on “who the approver is” and “which team needs to do what” are all built in at the request level in the form of request tasks and request approvals.

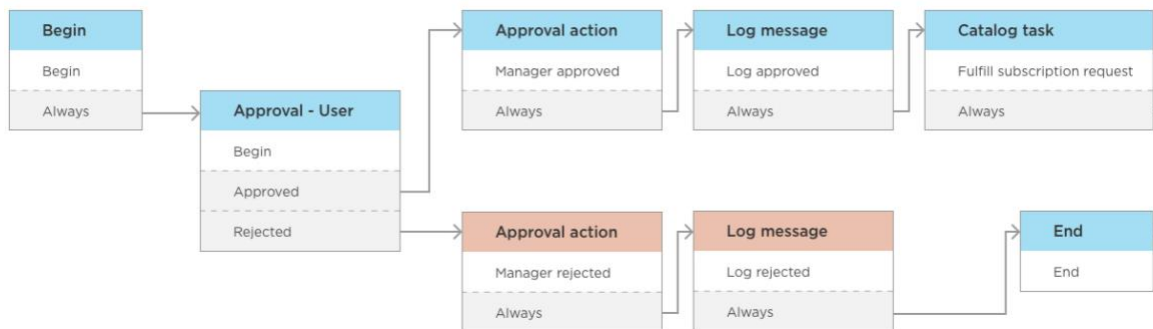


Figure 6: Example workflow for a subscription request

EXPERT TIP

Automate low-risk, low-ROI approvals and manual steps. Many low-risk, low-ROI activities, like approving a minor expense, don't require human intervention. Identify all such low-risk activities and configure the Service Catalog application to automatically approve or take the required steps (like reset a password) to eliminate the need for a human intervention. Explore the ServiceNow [Flow Designer](#) to automate your business processes.

Deploy standard workflows incrementally and incentivize service providers to adopt them

As you read in Stage 1, using a big bang approach for your adoption strategy is ambitious and can lead to many complications. Don't re-engineer the fulfillment process for all catalog items at the same time to remove redundancies—this is difficult and requires buy-in from all stakeholders (see Figure 5 for examples of the roles involved). Instead, take an incremental approach. Start with low-complexity, high-value catalog items and demonstrate their value—to secure executive buy-in—before you incorporate high-complexity, high-value catalog items into the new design.

Catalog managers may receive exception requests to create a new workflow that's based on a legacy fulfillment process. Not all these requests are unreasonable. Instead of taking an ad hoc approach to these requests, create a rigorous process to validate and design nonstandard workflows:

1. Ask service owners to outline their business needs and clearly articulate why their process can't comply with a standard fulfillment workflow.
2. Validate the nonstandard fulfillment process request with the catalog design team.
3. If it's approved, work with the solution architect to remove the redundancies in the business process the service owners requested.

4. Design the new, nonstandard workflow for the requested business process with the objective of making it available as standard option for future requests.

Following this process should encourage your team's service owners to use standard workflows for a faster time to market.

For the catalog items that don't have standard, automated workflows linked in the catalog, use the [execution plan](#) option in the Service Catalog application to notify the fulfillment team about the request. The fulfillment team can then follow their legacy method to complete the request. This ensures your end users don't have to wait for the new catalog workflow design to scale to all catalog items to find and request what they need. See this video for details on how to create [Service Catalog execution plans and workflows](#).

Stage 4 – Define the catalog design maintenance process

Good catalog design maintenance and ongoing iteration are essential to maintaining your world-class design. Ensure it grows and changes as your organization does.

KEY INSIGHTS

- Manage catalog item change requests as “services” to service owners.
- Let process users and owners make minor changes to catalog items without going through development.
- Track metrics that highlight performance gaps and fulfillment process redundancies.
- Conduct quarterly “user review board” meetings to evaluate feedback.

Many organizations don't have a service catalog maintenance process in place for making timely catalog updates. So they call on the catalog manager to make ad hoc changes without a clear mechanism to identify or prevent issues.

To avoid that, create a process to:

- Make incremental, minor fixes at the catalog item level
- Make proactive, major design changes at the catalog level

Make incremental fixes at the catalog-item level

Catalog managers don't always have visibility into the business context or customer needs to maintain catalog items. They must educate service owners on their responsibility to maintain the relevance and actionability of catalog items.

To simplify this, we recommend offering “catalog management as a service” to service owners and customers. Allow service owners to make requests to modify categories and catalog items. For example, all customers can report an issue, but only service owners can:

- Modify categories
- Add categories
- Modify catalog items
- Add catalog items

You must also define user criteria so you can manage who can request changes to catalog items.

Many organizations limit edit rights to the catalog manager and administrators, which often leads to long delays to implement minor changes. Instead, provide [catalog editor](#) rights to service owners so they can make changes and manage the catalog items they own.

Use the [Service Catalog item designer](#) for a structured design and publishing process to ensure consistency.

EXPERT TIP

Use the "Item designer category request" option from the ServiceNow demo data to allow service providers to request a new category. Once it's approved, they can create and manage their own catalog items.

Make catalog-level design changes

A common pitfall in service catalog maintenance is to wait until the design is completely broken before fixing it. This often leads to a complete revamp of the Service Catalog design. Instead, ask your design team to meet at least every quarter and look for trends and insights that indicate whether the catalog is meeting business objectives (see Stage 1). Quarterly design team meetings should:

- Review their progress toward the project's measures of success (see Stage 1)
- Review customer feedback (usually collected by the UX experts on the design team)
- Review predictive metrics that highlight the redundancies and performance gaps (see Table 6)
- Propose design changes to accelerate performance
- Create and approve a plan to roll out changes

Track the metrics listed in Table 3 to predict your catalog's performance gaps and to highlight its redundancies.

Metrics (examples)	Explanation	Evaluation depth
# of requests in backlog (trend analysis)	A high number of requests in the backlog indicate the fulfillment process is inefficient. The root causes for a large backlog include a stuck workflow, redundancies in fulfillment process, unclear SLAs, and ineffective demand prioritization.	<ul style="list-style-type: none"> • Catalog level • Individual catalog-item level (for additional insights)
Average delivery time per request	A high average delivery time per request indicates an inefficient process. The root causes for high delivery times include process redundancies and ineffective prioritization.	<ul style="list-style-type: none"> • Catalog level • Individual catalog-item level (for additional insights)
# of stagnant catalog items	Many stagnant catalog items indicate the catalog structure is not clear, the catalog items are no longer relevant to end users, or customers are not able to find them.	<ul style="list-style-type: none"> • Catalog level
# of “other” requests	A high number of requests made through the “other” category indicates that the catalog structure is not customer-centric—either people can’t find what they need or the catalog items they need are not available. To resolve this, reevaluate your categories, underlying hierarchy, and associated search tags. If most other requests are not part of the catalog item, consider creating a new catalog item or category.	<ul style="list-style-type: none"> • Catalog level
# of approvals with 100% approval rate	This shows the redundant approval requests in the fulfillment process. Evaluate all such approvals and remove them from the workflow if possible.	<ul style="list-style-type: none"> • Catalog level • Individual catalog-item level (for additional insights)

Table 3: Predictive metrics to highlight performance gaps and redundancies

EXPERT TIP

Use the ServiceNow [Assessments plugin](#) to gather customer feedback using targeted surveys.

The effectiveness of your maintenance processes depends on how well defined your design principles are, how well the design team works together, and how clear your catalog objectives and measures of success are.

The takeaway

As you design your world-class service catalog, remember these things:

- Service catalog design is not a project but an ongoing process that requires experts from across the organization to work together to create a superior customer experience and efficient provisioning.
- The catalog structure is critical to creating a good customer experience. Aim for no more than six to ten top-level categories based on how customers think of their needs, and have no more than three levels of hierarchy to get to a catalog item.
- A golden rule for workflow management is to have a minimal number of standard workflows that you can reuse for different catalog items. Aim for three standard workflows: small, medium, and large.
- For catalog maintenance, you need a process for making minor updates to the catalog items, and one for making major overhauls to the catalog, to keep it aligned to your measures of success.

Appendix

Related resources

- [Understanding Service Portfolio Management](#)
- [Creating Service Catalog Categories](#)
- [Flow Designer: Creating Your First Flow](#)
- [Creating Service Catalog Execution Plans and Workflows](#)