

# Collaborative Work Management Release Enablement

**March / April 2026**

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# Collaborate Work Management Value Evolution

9

Major Innovations

4

Family Releases

8

Store Releases

2024 Q1

**Washington D.C.**

- Collaborative Spaces
- Task Boards
- Collaborative Docs
- Connect to Strategy
- Automations
- Reference Column Type
- People Column Type
- Doc Templates

2024 Q3

**Xanadu**

- My Work Dashboard for CWM and SPM Tasks
- Automations to Assignees
- Duplicate Boards and Docs
- Useability Enhancements

2025 Q1

**Yokohama**

- Template Center for Boards and Docs
- Board Views
- Export Boards and Pages
- Access flow improvements
- Impact + CWM Better Together integrations

2025 Q3

**Zurich**

- Now Assist for CWM
- Generate Tasks from Docs
- Doc Summarization
- Space Management
- CWM Search
- Connected Work
- Sprint Planning
- Draft with Now Assist

2025 Q4

**Store Release**

- Unified Team and Enterprise Agile Planning
- Unified Tasks in My Work
- Dynamic Data in Docs
- Now Assist: Acceptance Criteria Generation

2026 Q1

**Australia**

- Now Assist for CWM
- Formula generation
- Scrum task generation
- Cross-work type relationships
- CWM for SPM team members

2026 Q3

**Brazil**

# What's New

Major and Minor Product Updates

# CWM Overview of Major New Features and Enhancements

Description | Business problems it solves | Benefits

## New Feature/ Enhancement

## What

## Business Outcomes

### Now Assist: Formula generation

Brings AI-powered formula capabilities into CWM, enabling users to create arithmetic, conditional, or text-based calculations by simply describing what they want to compute. Formulas are generated and applied within task lists, eliminating the need for spreadsheet exports.

Consolidates data intelligence within a single platform, allowing teams to perform sophisticated calculations without switching to external spreadsheets. By removing the syntax barrier, it empowers every user to derive instant insights and ensures that all analytical work remains synchronized within the system of record.

### Now Assist: Scrum task generation

AI-assisted story decomposition enables teams to automatically generate Scrum tasks from a story. With a single action, users can break down a story, creating multiple task records at once within CWM without manually defining each one.

Eliminates manual task breakdown to expedite sprint planning and save valuable team time. Provides an AI-generated execution blueprint for every story to reduce the risk of human error and drive a more productive, consistent agile environment.

### Cross-work type relationships

Dependency tracking across different work types, allowing teams to link related records and visualize relationships between stories, tasks, and other work items.

Empowers teams to gain deeper insights and navigate complex delivery landscapes with clarity. This holistic visibility increases productivity and reduces deadline risks, helping organizations synchronize efforts across diverse work types to ensure timely project completion.

### New Role: SPM Team Member

New role allows team members to update project and demand tasks in CWM.

Expands collaboration across project teams, reduces access bottlenecks and accelerate execution speed.

# CWM Overview of Minor New Features and Enhancements

Description | Business problems it solves | Benefits

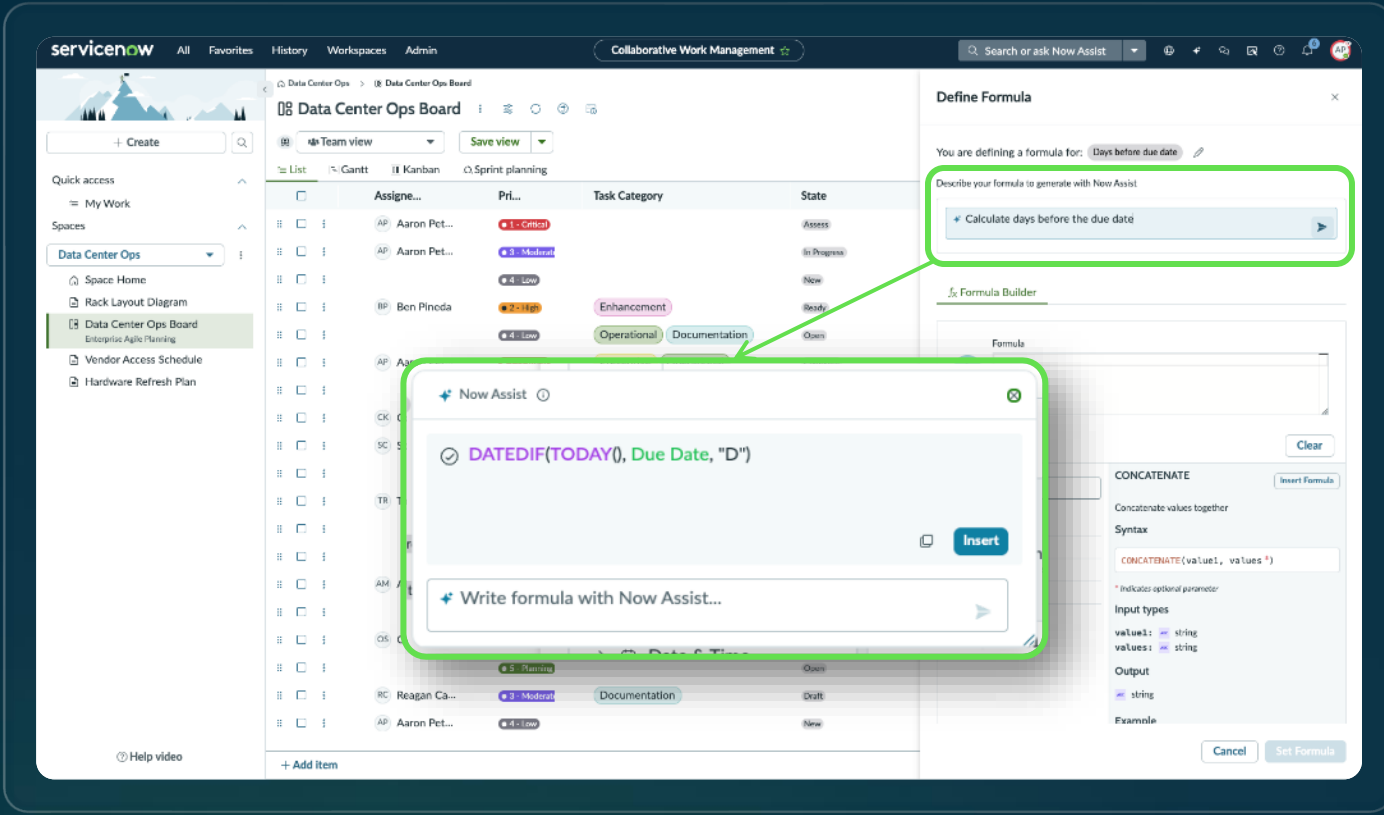
New Feature/ Enhancement	What	Business Outcomes
Quick filters in Kanban	Option to filter task cards directly within the Kanban view. Supports filtering by fields such as state and priority.	Improves triage efficiency by reducing board clutter. Helps teams quickly focus on the most relevant work.
Image download in Docs	Users will be able to download image in Docs within CWM.	Enables users to seamlessly retrieve and share visual content without manual workarounds.

# Major Enhancements

# Formula generation

★ Powered by Now Assist

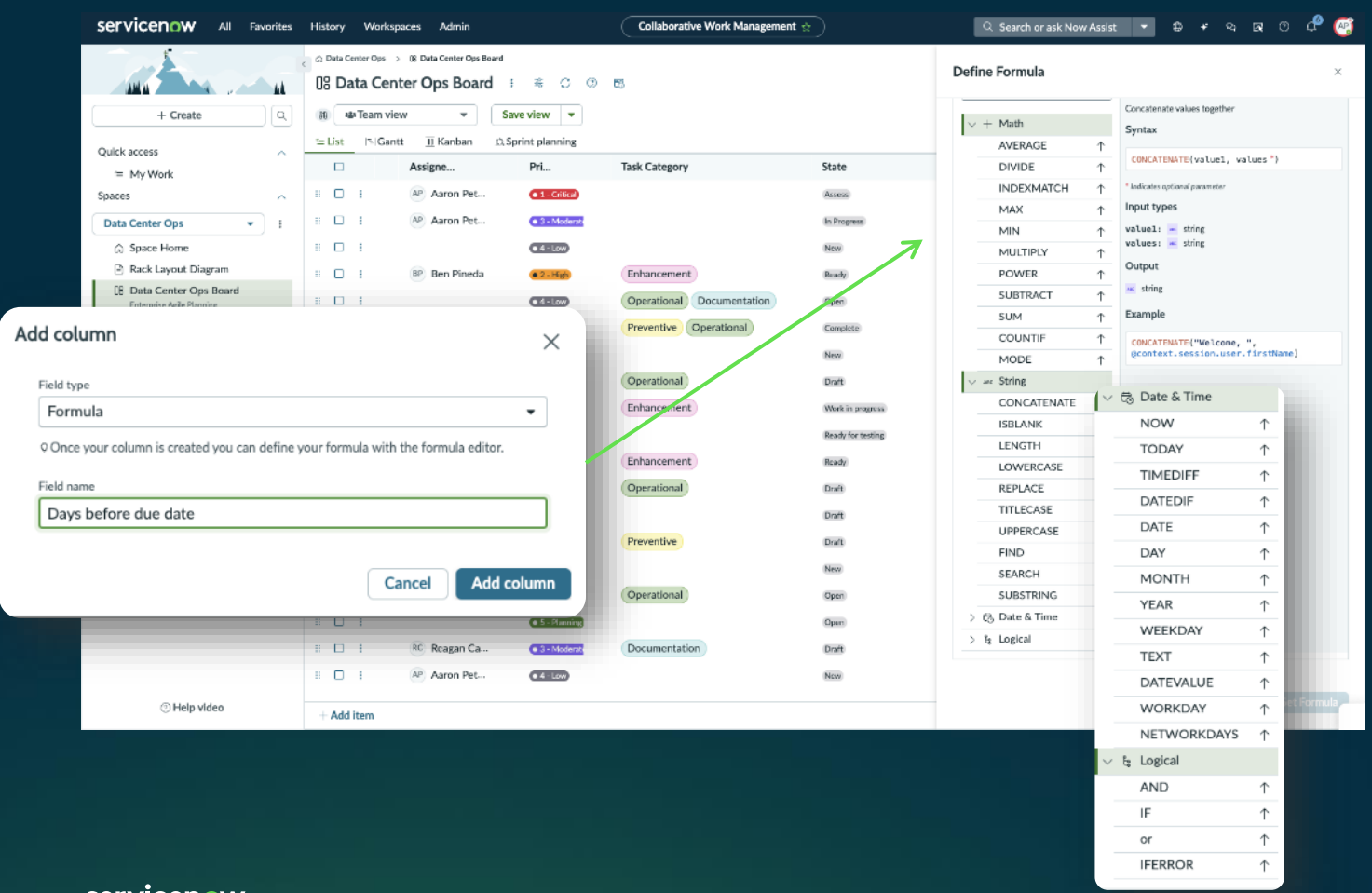
\$ Professional Plus



## Easily analyze data and perform calculations without switching tools

- 1 Instantly apply formulas to task data without exporting to spreadsheets or switching to external tools
- 2 Generate formulas without requiring formula syntax
- 3 Enable additional use cases that depend on calculated data, reducing silos

# Formula generation



## Standard

Formulas can also be created manually using the guided formulas builder:

- Supports basic math, date/time operations, string manipulation, and logical expressions
- Apply formulas to task data in real time

# Formula generation

## Fact Sheet

### Why we added it

Empower users to perform advanced analytics and calculations within CWM without requiring technical syntax expertise or external spreadsheet tools

### Technical

- Users need to have CWM app and Now Assist for CWM app installed with right roles to access any Now Assist features

### How you activate it

- No config/toggles necessary

### Before/After

Before: Users must export data for calculations or rely on third-party tools to generate formula syntax

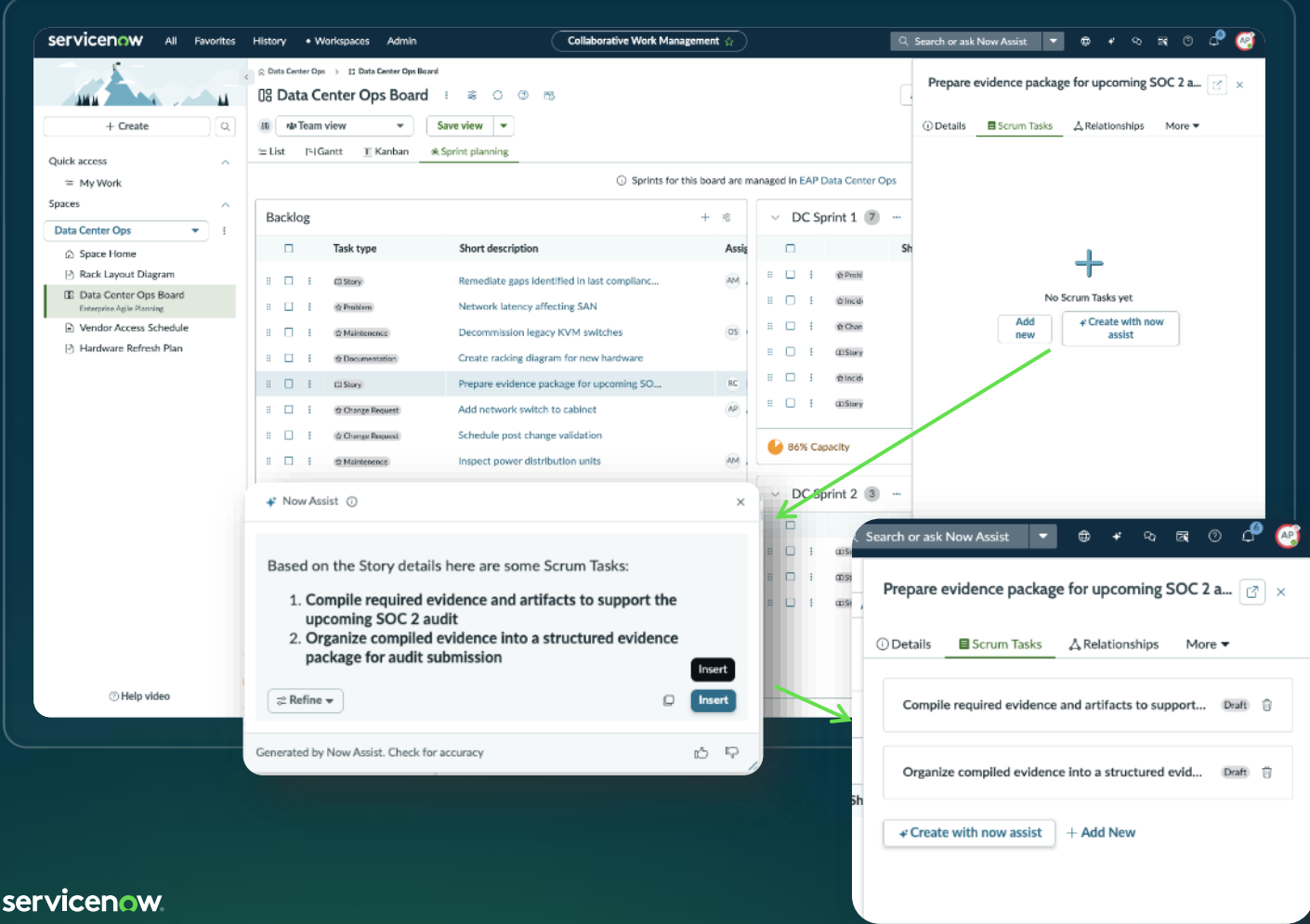
After: Users can generate accurate, complex formulas using natural language directly within the CWM grid.

# Scrum task generation

★ Powered by Now Assist

\$ Professional Plus

Save time and reduce manual work required to breakdown stories into executable tasks



- 1 Generate standardized scrum tasks from a story automatically with Now Assist
- 2 Eliminate repetitive manual data entry for task structures
- 3 Expedite work planning to execution, ensuring consistency across all team tasks

# Scrum task generation

## Fact Sheet

### Why we added it

Save time and effort required to generate repetitive scrum tasks

### Technical

- Update to latest version of CWM
- Backwards compatible with Zurich and Yokohama Patch 1

### How you activate it

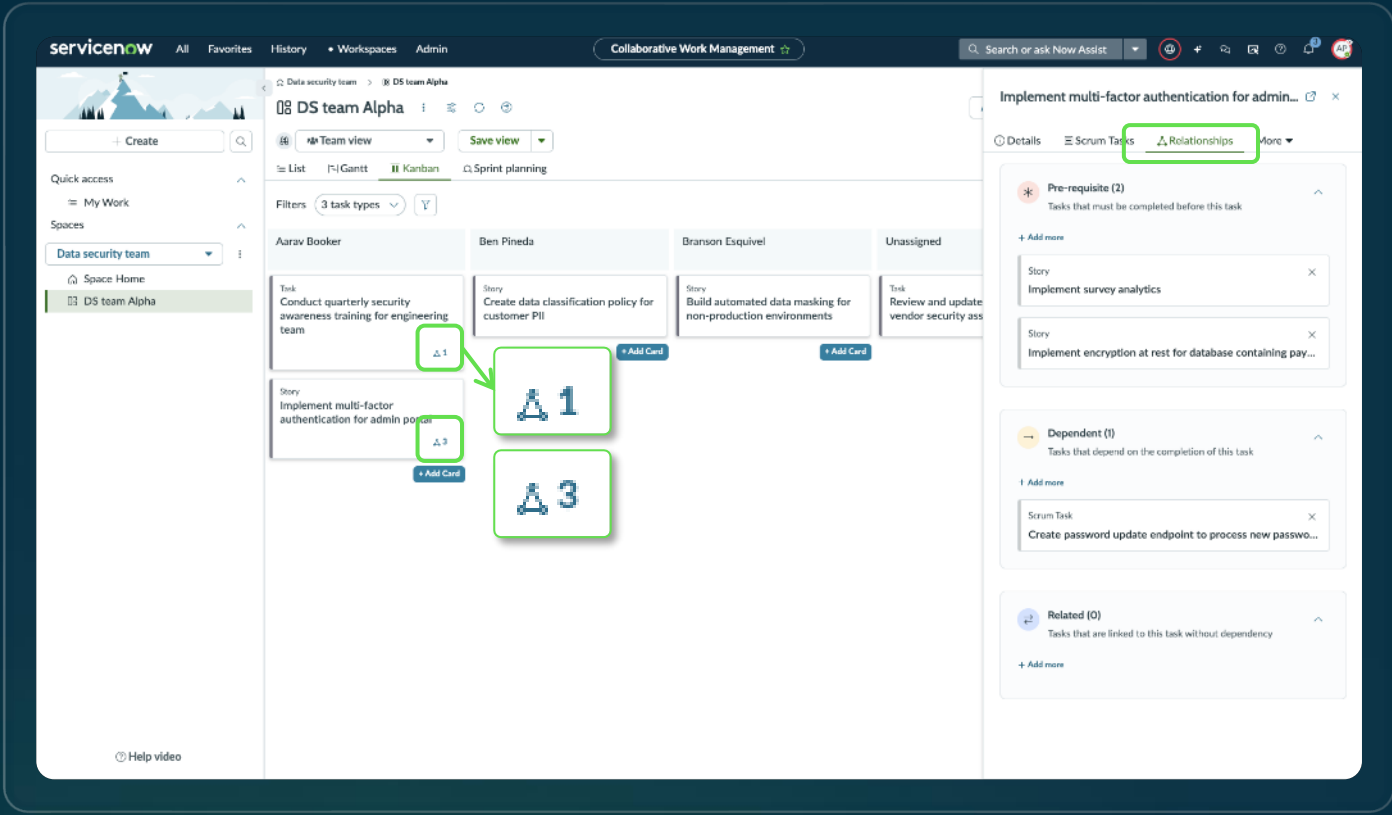
Activate within the "Agile work item type" under "Manage work item types" on the CWM board

### Before/After

Before: PMs had to manually create repetitive task structures for every story

After: Now PMs can generate standardized scrum tasks from a story automatically with Now Assist

# Cross-work type relationships



## \$ Standard

**Gain deeper insights and optimize work delivery with dependency tracking**

- 1 Track relationships across stories and other work to anticipate bottlenecks and keep delivery on schedule
- 2 Align teams on how their tasks impact other activities regardless of work type
- 3 Visualize cross-team dependencies to ensure smooth project flow and timely execution

# Cross-work type relationships

## Fact Sheet

### Why we added it

Provide a holistic view of interconnected work items to help teams anticipate risks and synchronize delivery across different task types

### Technical

- Update to latest version of CWM
- Backwards compatible with Zurich and Yokohama Patch 1

### How you activate it

No config/toggles necessary

### Before/After

Before: PMs must manually track relationships across different boards or tools, making it difficult to identify hidden bottlenecks

After: PMs only need to view the dependency map in one place to see all interconnected tasks and ensure on-time delivery

# CWM for SPM team members

## \$ Standard

Team members can now update project and demand tasks in CWM. Tasks can be access in two ways:

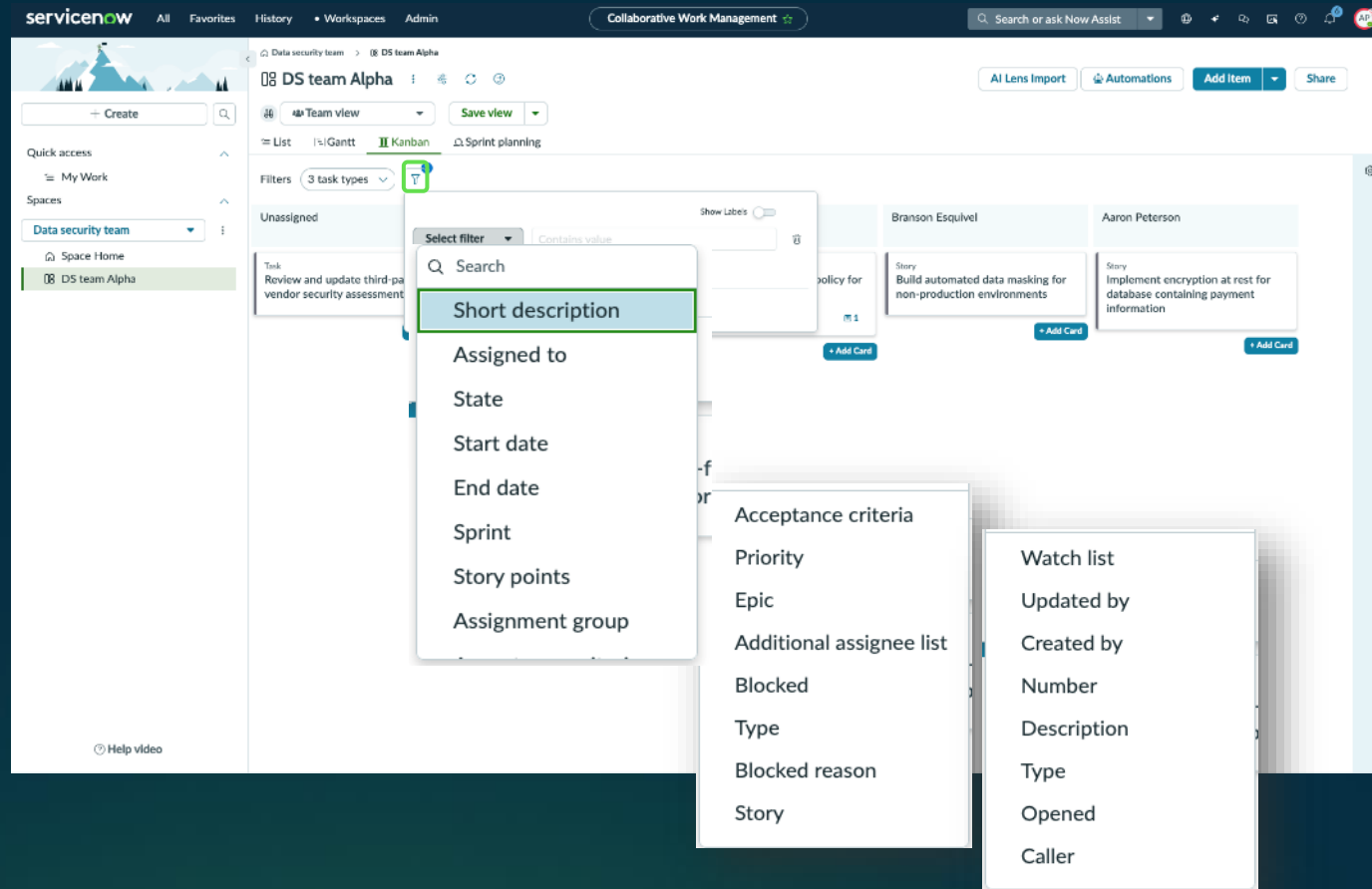
- from CWM boards using Connected Work
- from My Work

There are two new roles:

- `sn_stm.team_member_read`: Team members with this role can view and leave comments on project and demand tasks
- `sn_stm.team_member_read_write`: Team members with this role can view and edit project and demand tasks

# Minor Enhancements

# Quick filters in Kanban



## \$ Standard

Users can now apply filters directly within the Kanban board view

- Filter cards by state, priority, and other available fields
- Instantly move and narrow down visible tasks without leaving the board

**Thank you**

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