

Goal Framework for SPM

Meet Up

Molly Feterl

Principle Product Manager, Product Success SPM



Little House keeping

There will be time for Q&A after the presentation. Please use the Q&A feature to ask questions throughout the session.

Session will be recorded and shared on the ServiceNow Community after the session.

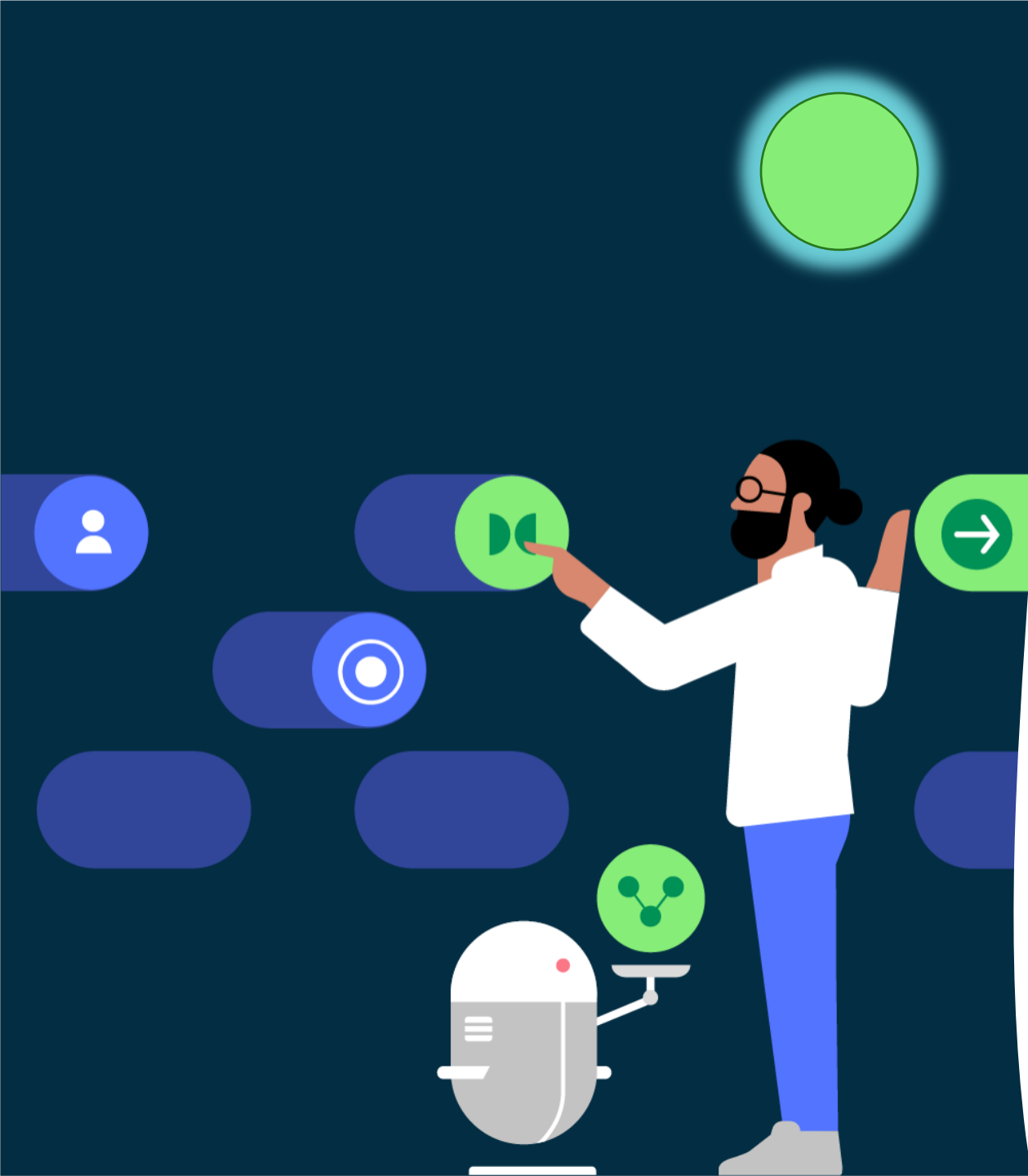
After the session ends, you will be prompted to fill out a short survey. Thank you for your feedback!

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This presentation may contain “forward-looking” statements that are based on our beliefs and assumptions and on information currently available to us only as of the date of this presentation. Forward-looking statements involve known and unknown risks, uncertainties, and other factors that may cause actual results to differ materially from those expected or implied by the forward-looking statements. Further information on these and other factors that could cause or contribute to such differences include, but are not limited to, those discussed in the section titled “Risk Factors,” set forth in our most recent Annual Report on Form 10-K and Quarterly Report on Form 10-Q and in our other Securities and Exchange Commission filings. We cannot guarantee that we will achieve the plans, intentions, or expectations disclosed in our forward-looking statements, and you should not place undue reliance on our forward-looking statements. The information on new products, features, or functionality is intended to outline our general product direction and should not be relied upon in making a purchasing decision, is for informational purposes only, and shall not be incorporated into any contract, and is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of any features or functionality described for our products remains at our sole discretion. We undertake no obligation, and do not intend, to update the forward-looking statements.

Agenda

- I. Introduction
- II. Strategic Portfolio Management Overview
- III. Goal Framework for SPM
 - a. Key Concepts
 - b. Personas and roles
 - c. Architecture
 - d. Process and Functionality
- IV. Open discussion
- V. Wrap up



Thanks for joining us today!



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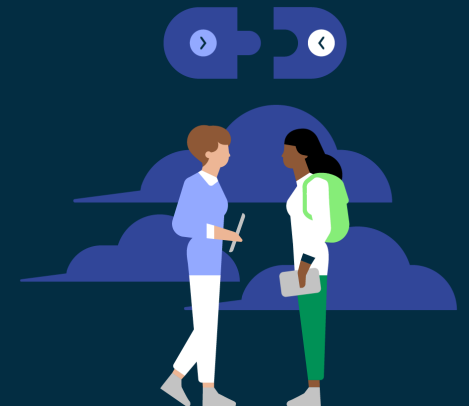
Name: Molly Feterl

Title: Product Success Manager

Function: Strategic Portfolio Management

Company: ServiceNow

Location: South Dakota USA



Quick Survey #1

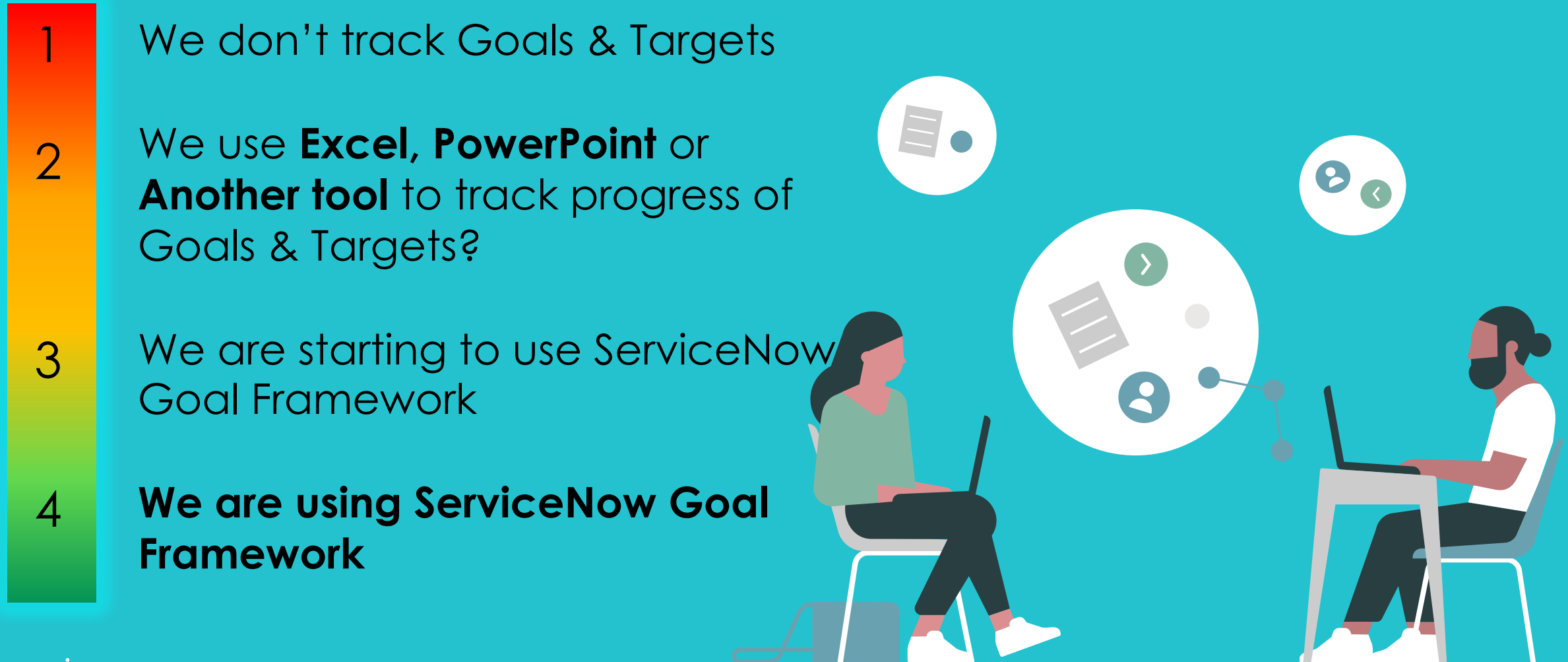
Are you aligning work to Strategic Goals with Targets?

- 1 We currently **do not align work with goals**
- 2 We have started however **going slow**
- 3 **Progressing** as planned and expecting good results
- 4 Seeing **good results** already, progressing well



Quick Survey #2

Where do your teams track progress Goal & Targets?

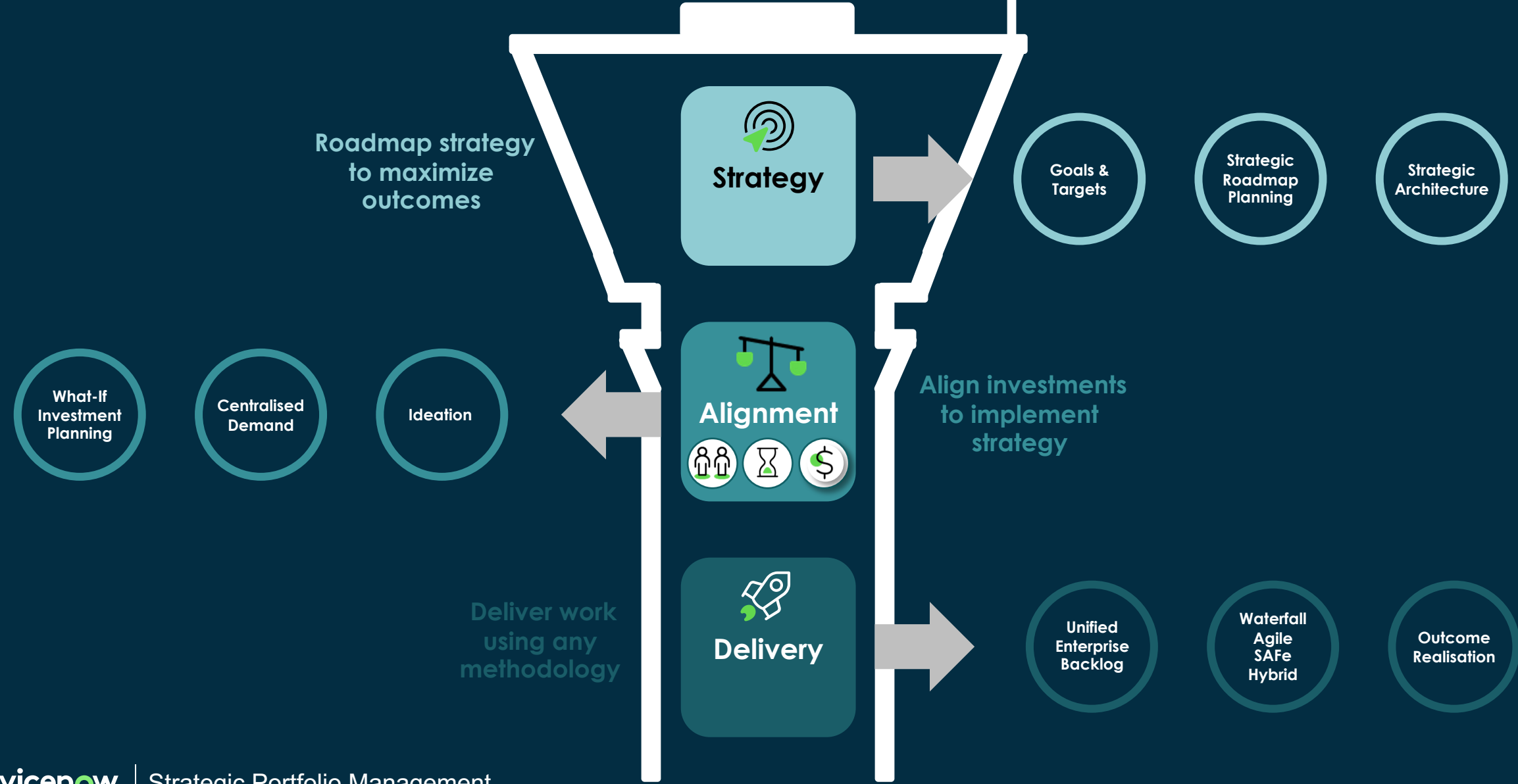


Overview

Strategic Portfolio Management



Strategic Portfolio Management



Strategic Portfolio Management

Strategic Planning



Goal Framework



Portfolio Prioritization



Roadmap Planning



Scenario Planning



Investment Funding



Innovation Management

Enterprise Agile



Scaled Agile Framework



Agile Development



Lean Portfolio Management



Digital Product Management



Unified Backlog



Test Management

Project Portfolio Management



Portfolio Management



Program Management



Project Management



Resource Management



Financial Planning



Demand Management



Benefits Realization Management



Timesheet Management



Integrations



Automated status reports



Dashboards



Workflows



Workspaces



Bench marking



Surveys & Assessments



Artificial Intelligence



Cloud



Common Data Model



Mobile Experience

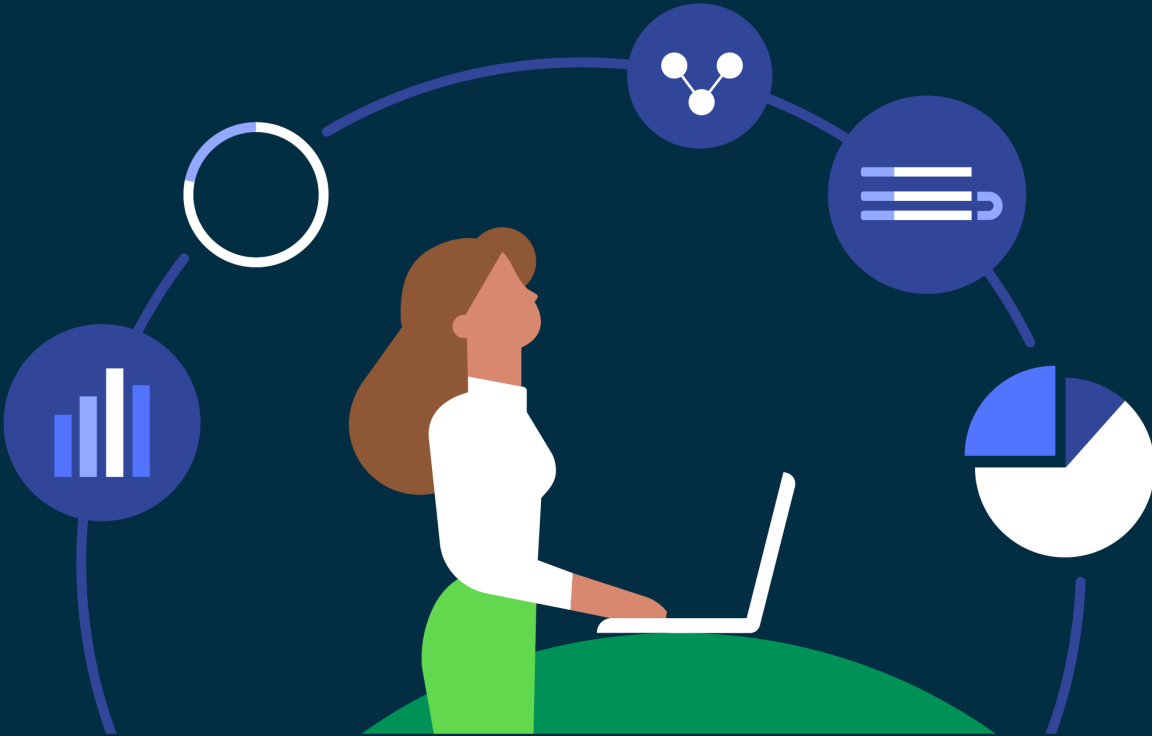


Chat Bot



Data Filtration

Goal Framework



Single place to **set, track, and evaluate goals** to accomplish targets that drive outcomes



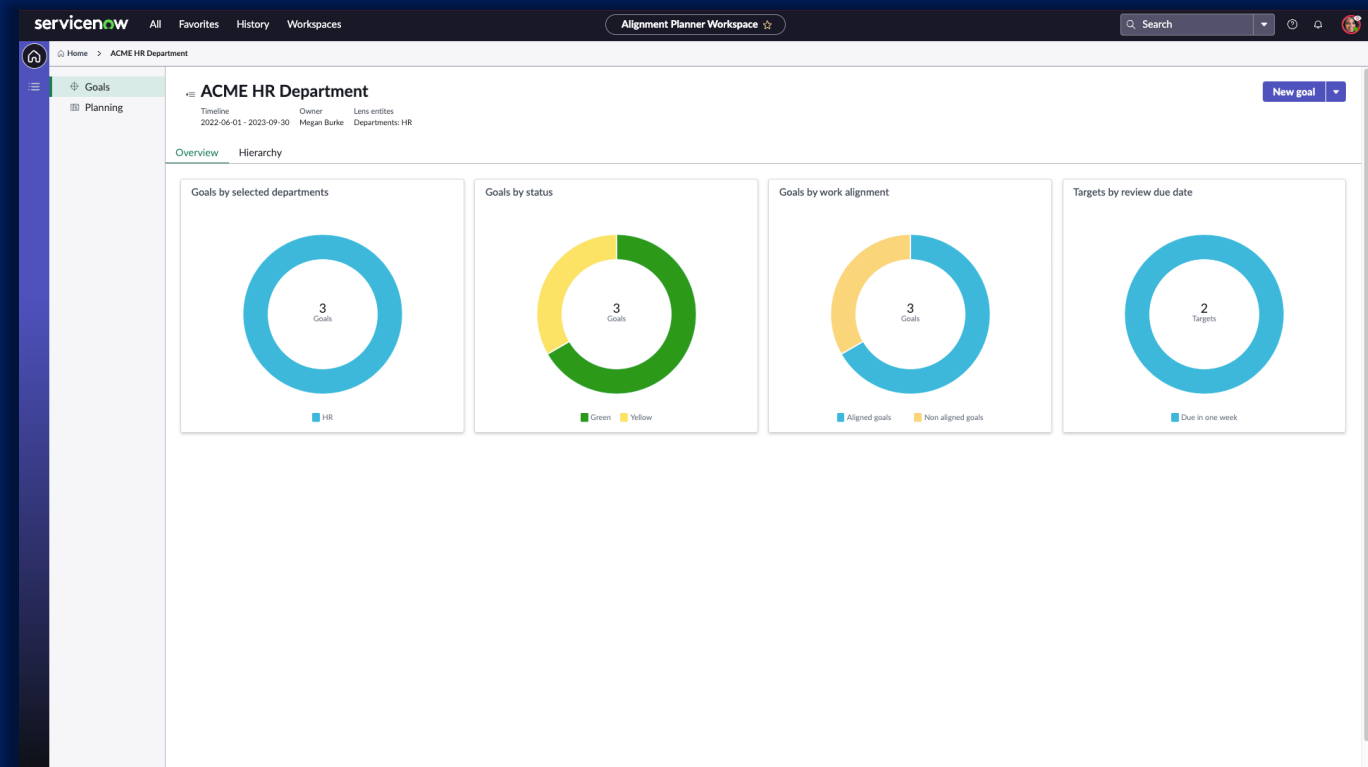
Associate strategic goals to all types of work



Update and track goal progress in real-time



Create shared end-to-end goal visibility

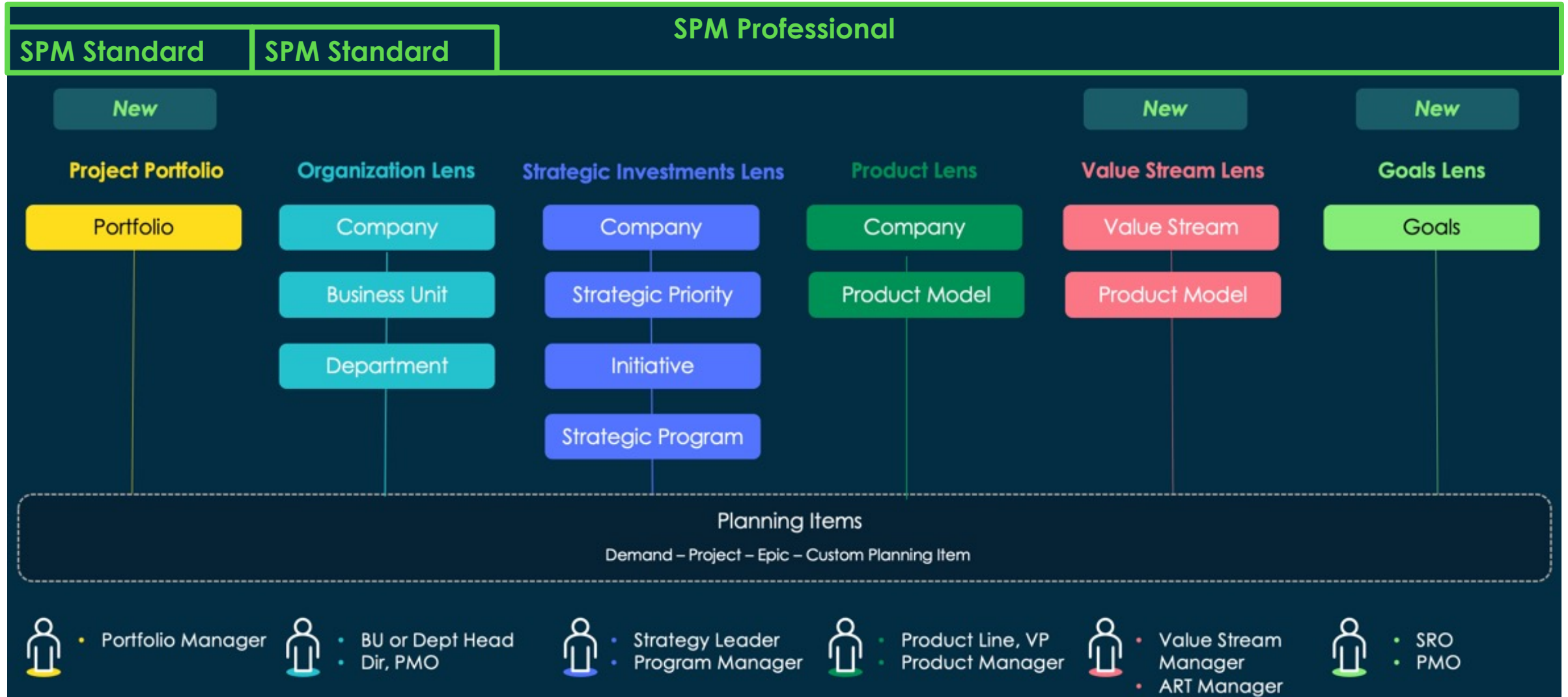


Goal Framework

Key Concepts

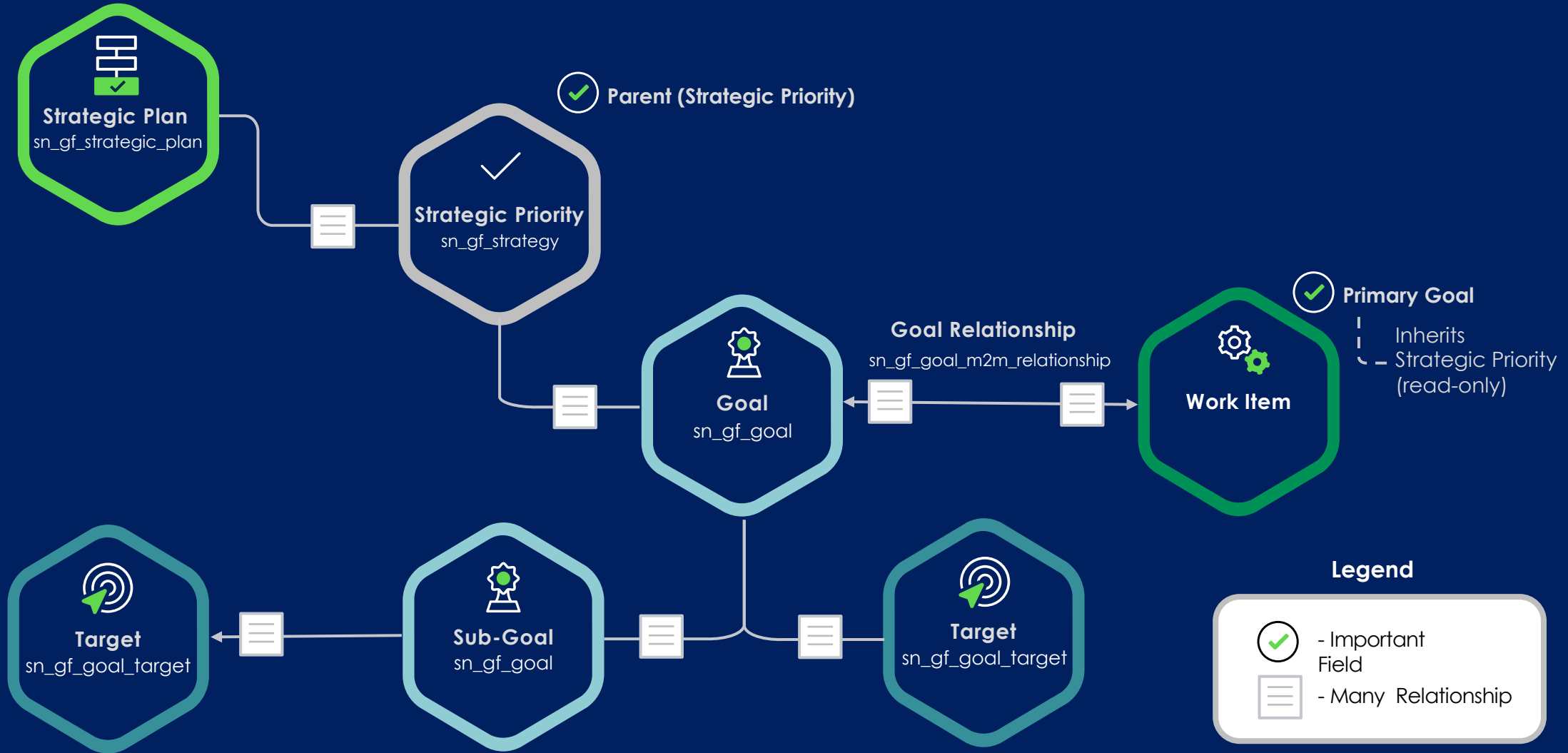
Strategic Plan	Strategic Priority	Initiative	Strategic Program
<p>Defines the vision, purpose (mission), and core values of your organization</p>	<p>Defines the strategy to operationalize your strategic plan and orient towards your organizational goal. - also known as focus areas or long-term strategies</p>	<p>Specific activities the organization will undertake to put in place its strategic priorities</p>	<p>Specific activities the organization will undertake to put in place its Initiatives</p>
Planning Items	Goal	Sub-goal	Target
<p>Planned work that can be created for a planning entity</p> <p>Examples of planned work: Demand, Project, SAFe Epic, Agile, etc.</p>	<p>Specific financial and non-financial objectives and results a company/ department/ portfolio aims to achieve over a specific period of time.</p> <p>Goals are typically qualitative by nature, should be ambitious and are expected to motivate and challenge your teams</p>	<p>Part of a parent goal that aims to achieve specific results over a period of time</p>	<p>track and measure the progress of the goals</p>

Pre-Designed Lenses



SPM Goal Framework (OKRs)

Connects strategy and execution through OKRs



SPM Personas



**Strategy
Officer/Executive
Leader**

Responsible of setting up the strategic goals for the organization, Works with portfolio managers to plan for the roadmap and tracks investment interdependencies using cross-portfolio analysis



**Portfolio/Product
Manager**

Responsible for aligning organization goals to product or portfolio vision with a future roadmap. Manage the strategy backlog, evaluate planning items, and prioritize them to create the roadmaps.



Portfolio User

Can review portfolio information



**Demand/Project
Manager or Product
Owner**

Breaks the initiatives into smaller work items – projects/ demands/ epics/ feature



SPW admin

Responsible for configuring the solution

Goal Framework Personas & Roles

Personas	SPW Role	Description	Contains Roles
<ul style="list-style-type: none"> SPW Admin Goal Admin 	Goal Framework for SPM - Admin [sn_gf.goal_admin]	<ul style="list-style-type: none"> Can update the goal preferences. Can create target sources and context variables as part of enabling the target automation feature. 	<ul style="list-style-type: none"> sn_gf.goal_user_read sn_gf.goal_user
<ul style="list-style-type: none"> Strategy Officer / Executive Leader Portfolio / Product Manager Demand / Project Manager Product Owner 	Goal Framework for SPM - User [sn_gf.goal_user]	<ul style="list-style-type: none"> Can create, view, edit, and delete goals, sub-goals, and associated targets. Can remove the existing goal relationships between work item and goal, from the Goal Relationship 	<ul style="list-style-type: none"> sn_gf.goal_user_read
<ul style="list-style-type: none"> Portfolio User 	Goal Framework for SPM - Read Only User [sn_gf.goal_user_read]	<ul style="list-style-type: none"> Can view the goals. This role can be given to users such as the project user and demand user. 	None

Process of Goal Framework for SPM

Connects strategy to execution for better alignment and engagement of teams around common outcomes

01 Define goals



a.k.a Objectives

- Create goals at any level in the organization
- Time bound the goals
- Assign owner, contributors
- Align goal to any other goal or strategic priority
- Cascade goal by creating sub-goals

Example:

Grow customer base in FY23

02 Set Targets



a.k.a Key Results

- Quantify the goals by setting ambitious targets
- Time bound the targets
- Assign owner, contributors
- Define metrics – base value, target value, actual value
- Automate the targets

Example:

Acquire 100 new logos in FY23

03 Align work



Prioritize the right work

- Define the purpose of your work (projects, epics etc.)
- Identify and prioritize the work that helps you achieve your goals / targets
- Provides visibility into the work – top down and bottom-up

Example:

Run a project for Brand Awareness and Offering

Comments or Questions

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Thank you

With image/photo



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Appendix

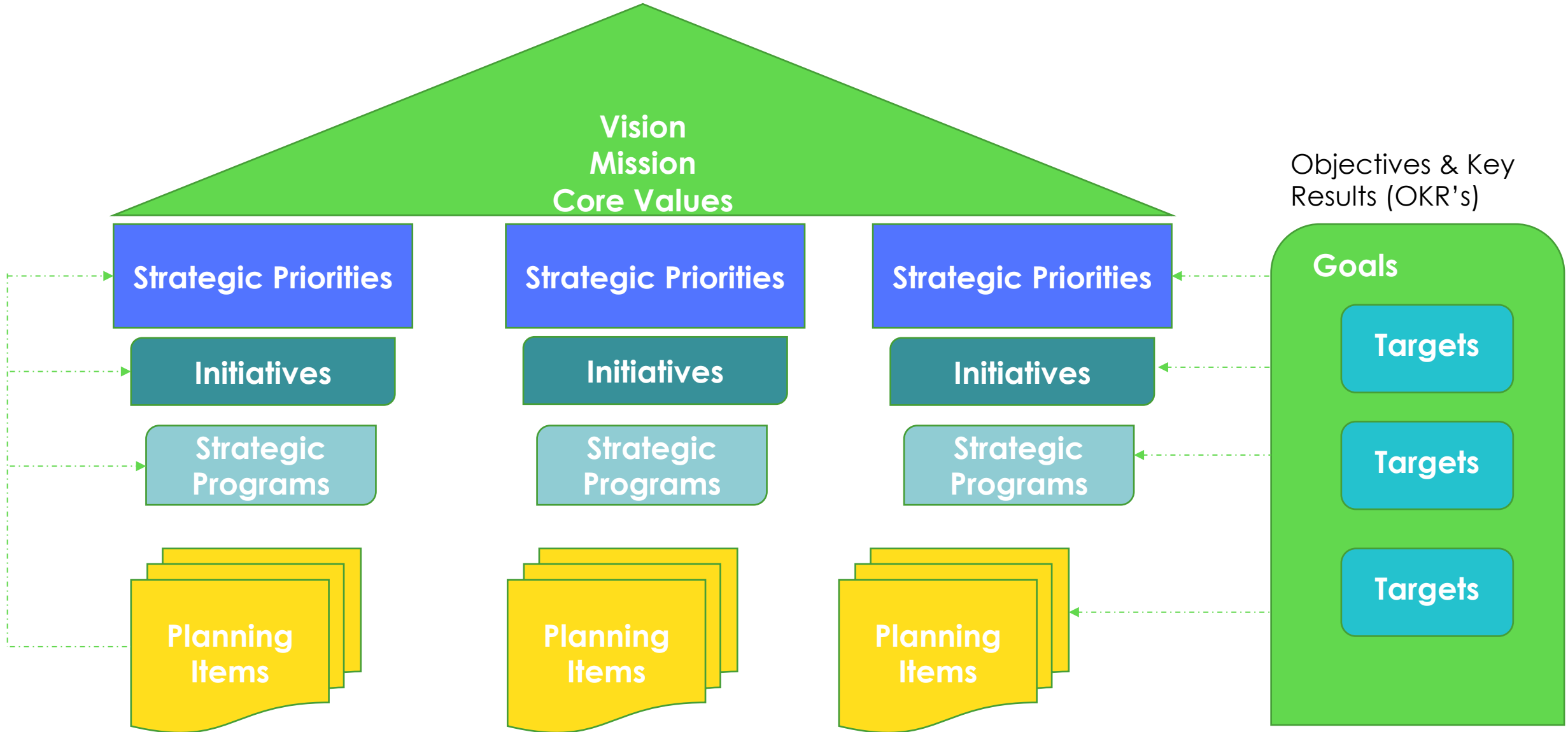
SPW Personas & Roles

Personas	SPW Role	Description	Contains Roles
<ul style="list-style-type: none"> SPW Admin 	Strategic Planning Workspace admin [sn_align_core.apw_admin]	<ul style="list-style-type: none"> Can define the planning hierarchy in the workspace by configuring the process definitions. Can configure the workspace integrations. Can configure Workspace view 	<ul style="list-style-type: none"> it_portfolio_manager sn_align_core.apw_user sn_gf.goal_admin view_changer
<ul style="list-style-type: none"> Strategy Officer / Executive Leader Portfolio / Product Manager Demand / Project Manager Product Owner 	Strategic Planning Workspace user [sn_align_core.apw_user]	<ul style="list-style-type: none"> Can create, update, and delete planning items and roadmaps. Can create, update and delete backlog items Can create, edit and delete goals and targets 	<ul style="list-style-type: none"> sn_align_cmn_int.user sn_milestones.milestone_edit or sn_gf.strategy_planner sn_gf.goal_user sn_align_core.ap_read_only model_manager
<ul style="list-style-type: none"> Portfolio User 	Business stakeholder [business_stakeholder]	<ul style="list-style-type: none"> Can view and create roadmaps in the APW application. Can personalize the roadmaps. Note: Users with this role do not have access to create or edit any roadmap items. 	None

Key Concepts

Strategic Planning Workspace	Lens Structure	Portfolio Plan	Roadmap
<p>unified graphical interfaces for an Integrated Roadmap Planning allowing Portfolio Managers to plan and track traditional and agile work within their portfolio</p>	<p>Defines the hierarchy used within a Lens. The lens structure consists of lens entities</p> <p>Lens Entity: represent different levels of planning</p> <p>.</p>	<p>Personalized portfolio plan that enables focused planning of work in the desired perspective (lens) to align with strategy and drive shared outcomes.</p> <p>Portfolio plans are also shareable,</p>	<p>Visualization of planned work that is prioritized and aligned to business objectives.</p> <p>Connects investments and teams to strategy</p>
Planning Item	Strategic Plan	Strategic Priority	Initiative
<p>Planned work that can be created for a planning entity</p> <p>Examples of planned work: Demand, Project, SAFe Epic, Agile, etc.</p>	<p>Defines the vision, purpose (mission), and core values of your organization</p>	<p>Defines the strategy to operationalize your strategic plan and aligns your organizational goal.</p> <p>- also known as focus areas or long-term strategies</p>	<p>Specific activities the organization will undertake to put in place its strategic priorities</p>
Strategic Program	Goal	Sub-goal	Target
<p>Specific activities the organization will undertake to put in place its Initiatives</p>	<p>specific financial and non-financial objectives and results a company/ department/ portfolio aims to achieve over a specific period of time.</p> <p>Goals are typically qualitative by nature, should be ambitious and are expected to motivate and challenge your teams</p>	<p>Part of a parent goal that aims to achieve specific results over a period of time</p>	<p>track and measure the progress of the goals</p>

Strategic Plan Hierarchy



Goals Use Case

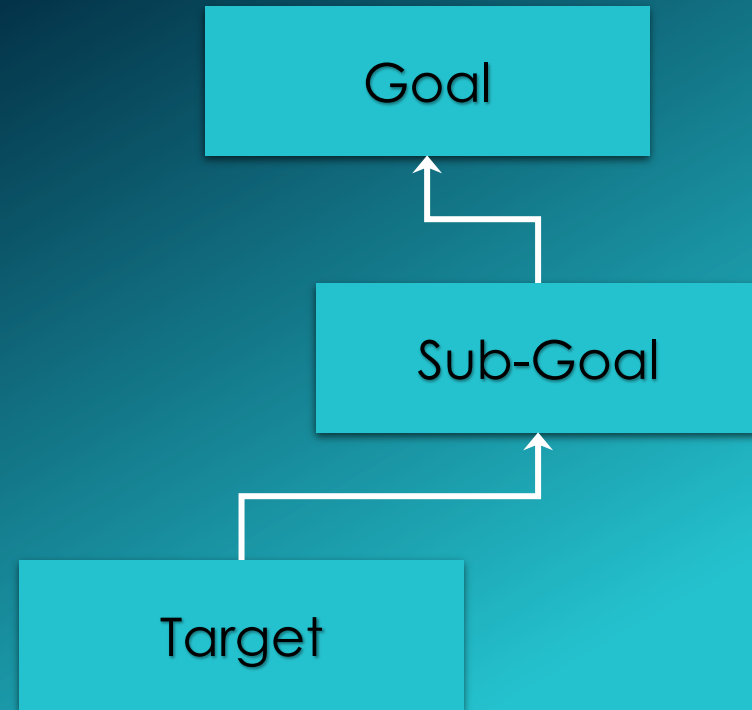




Goal Hierarchy

Create and manage goals and their targets (OKR's) across the organization

Understand the alignment of work to goal attainment

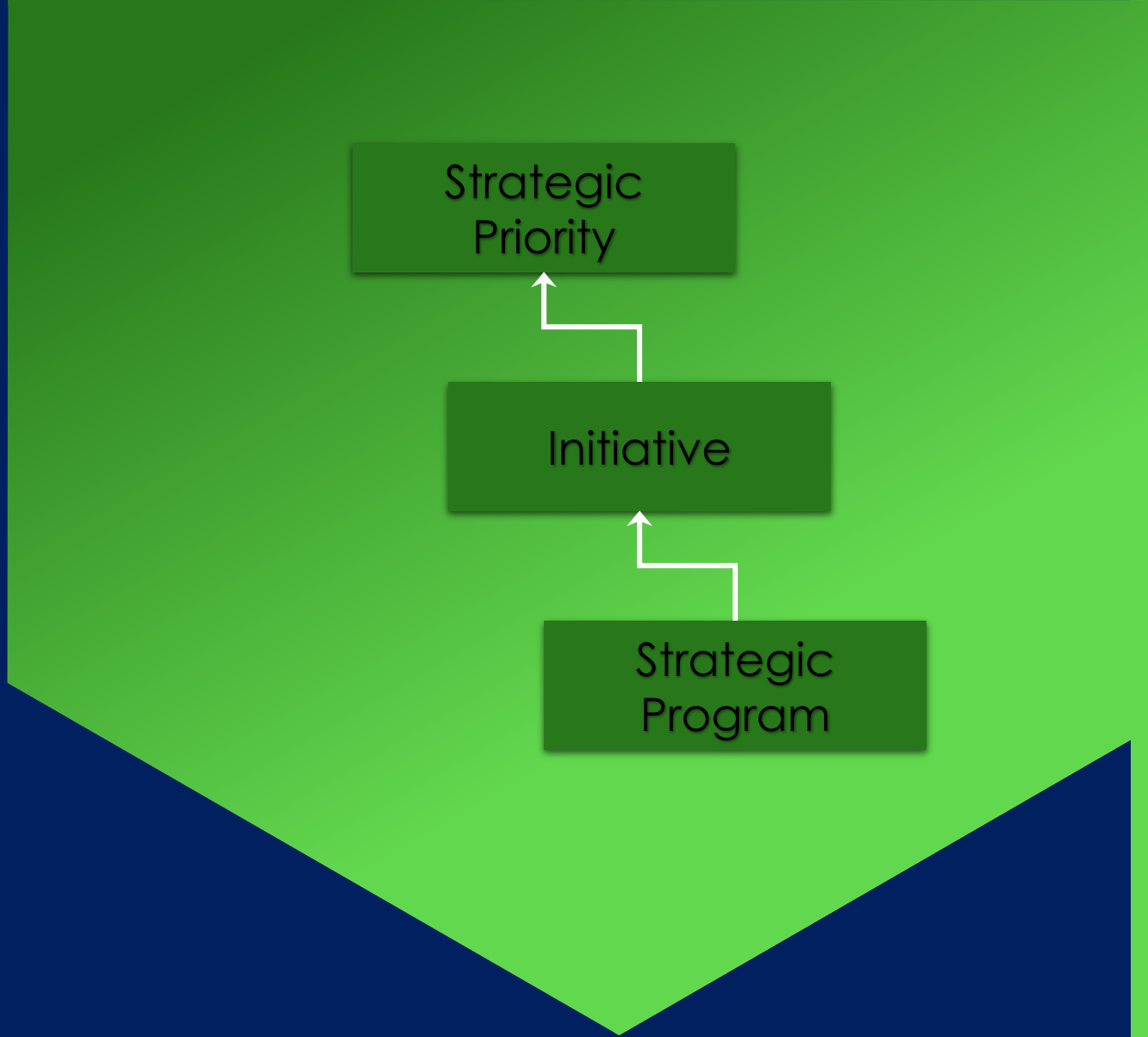




Strategy Hierarchy

Create and manage strategic roadmap that traverse the organization

Ensure different parts of the organization are prioritizing and planning your most strategic work against their non-strategic work

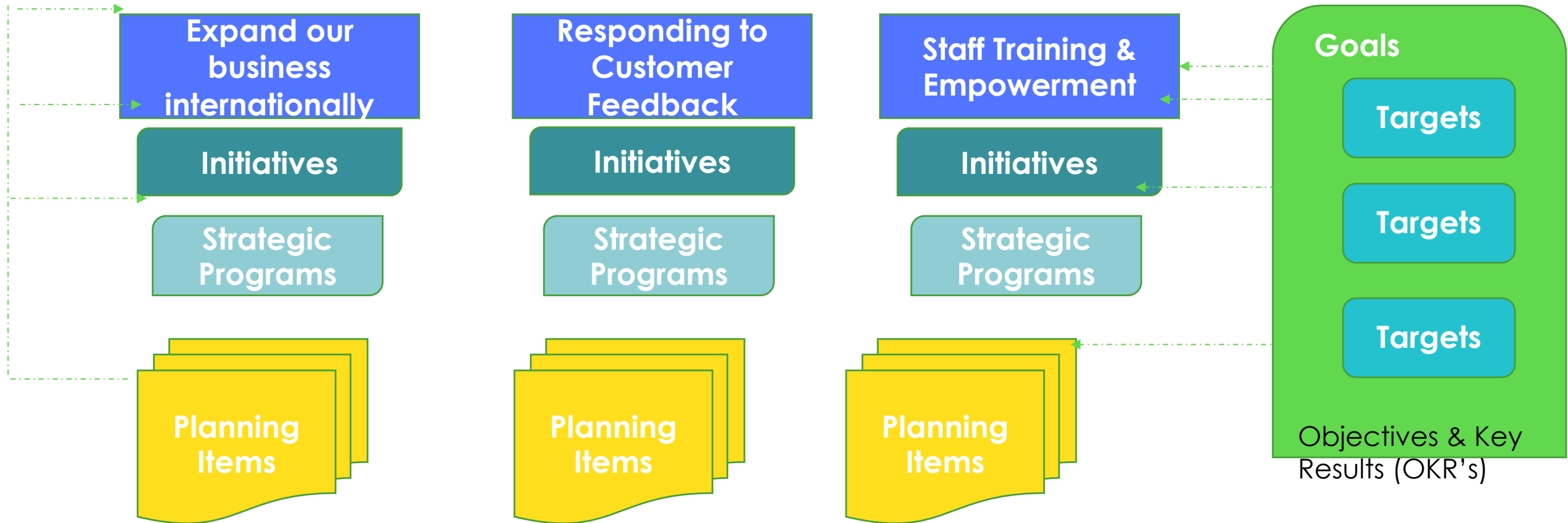


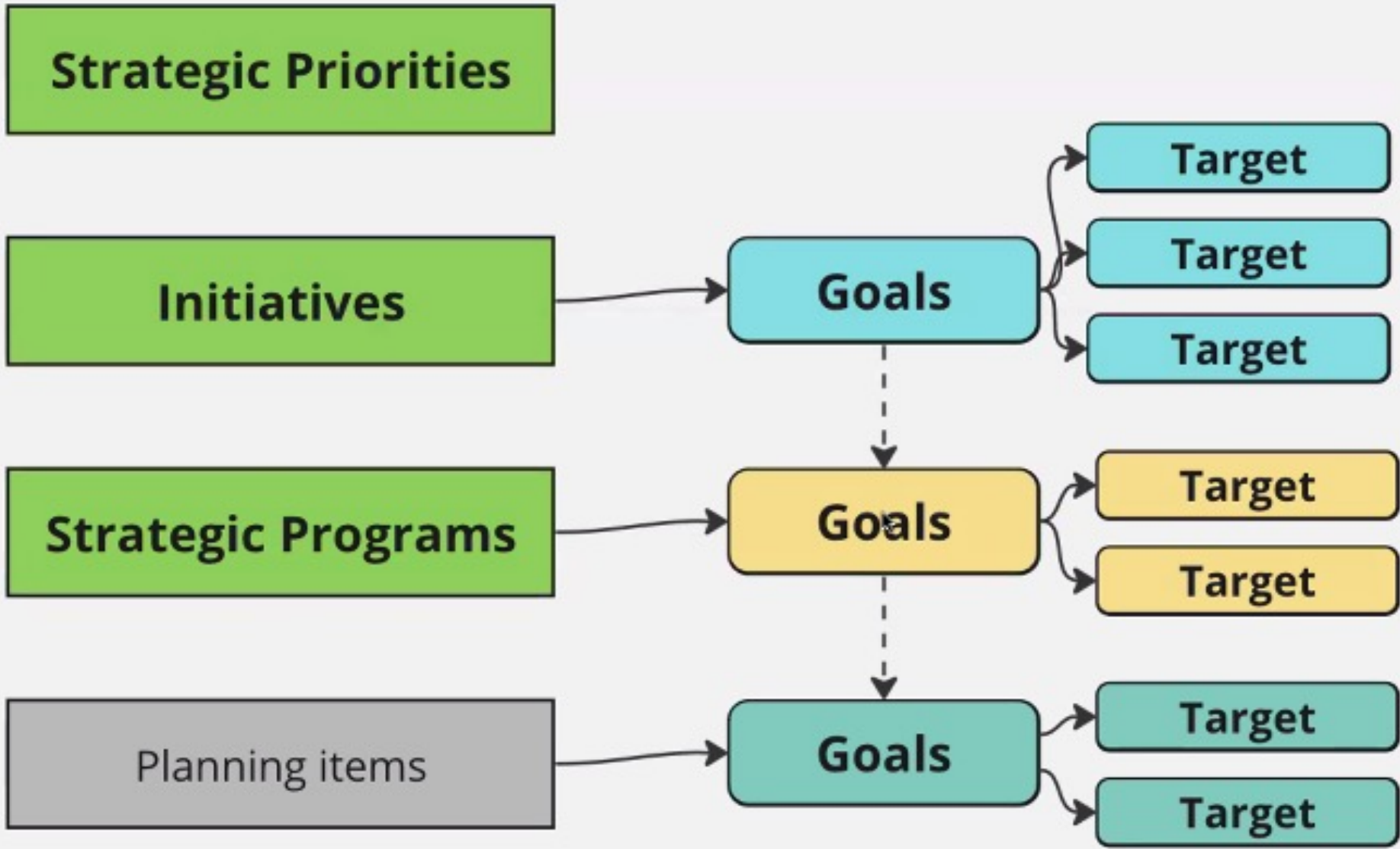
Key Concepts

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Strategic Plan Hierarchy

The number one mobile communications supplier of choice in the Nation.
Energy Empathy Continuous Learning





Goal Framework



Topics

- 1 Goal Dashboard
- 2 Hierarchy (grid, personalize, etc.)
- 3 Goal, Sub-goal, Target, and Align work
- 4 Tracking

Use Cases

Ability to do strategic planning by defining Goals / OKRs in the Strategic Planning Workspace:

- Create Goals / Objectives within Portfolio Plans
- Create sub-goals and cascade goals throughout the organization for better alignment
- Set targets for goals / sub-goals and review the progress periodically
 - Automate the target actuals from any SN table sources
- Align relevant work items to the Goals for better prioritization and engagement of teams
 - Projects, demands, epic (standard work items)
 - Initiatives, strategic programs (strategic items)
 - Product, Capability, Value Stream etc.
- Track the goals / targets periodically through actionable insights from widgets and analytics
- Goals grid can be personalized to support user interactions such as sorting, adding / hiding, reordering, filtering the columns.

Use Cases

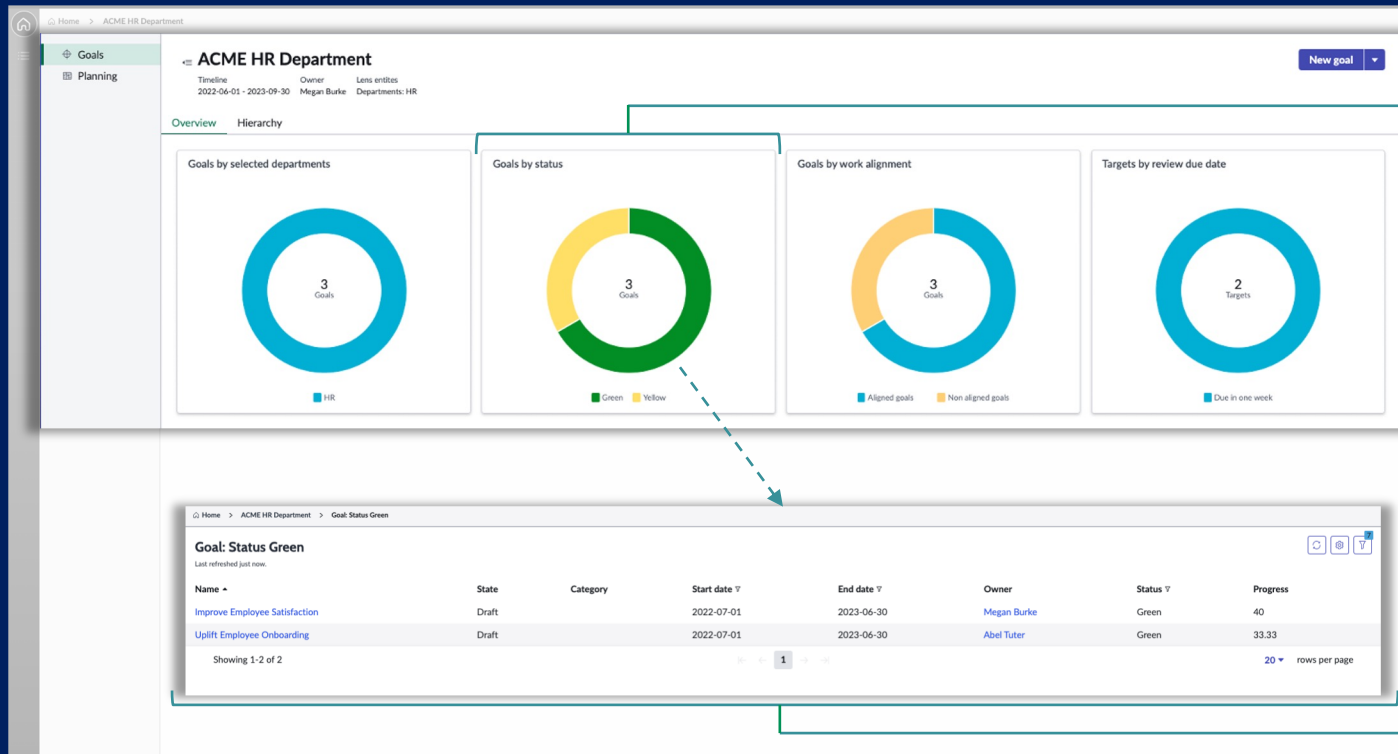
- SPW users will be able to do strategic planning by defining Goals / targets (OKRs) in the Strategic Planning Workspace.
- SPW users such as portfolio managers, program managers, product managers etc. will have an ability to create and manage goals / targets consistently for all lens entities.
 - OOTB **lens entities** such as Business Unit, Department, Product, Initiative, Strategic Program etc. will be available as **Assigned Entities** on the Goals.
 - Users will be able to add new / remove existing entity as Assigned Entity, as needed.
 - Assigned Entity represents complete ownership of a particular Goal.
- Ability to associate goals to SAFe feature (on execution side).

Use Cases

- **Goal Framework for SPM** is a dependent plugin of Strategic Planning Workspace (SPW) and so it gets installed along with SPW app entitled for SPM Pro users.
- From the **Goals module** within each portfolio plan, users will be able to create and manage Goals / OKRs, set targets and automate actuals, and align work with goals
- Goals can be associated consistently with all lens entities in 1:M manner. (One entity can own multiple goals).
- All OOTB lens entities will be available as Assigned Entities on the Goals by default.
- The performance of Goals grid is optimized to display 500 records. However, you could update the limit through a property.

Note: If the goal relationships are already created for lens entities other than Company, BU, Department, Portfolio, then please run the migration script provided on slide 17. This script migrates the goal relationships from goals m2m table to direct goal table so that the goals can be accessed in the portfolio plans seamlessly. Please refer the documentation for more details.

Goal Dashboards



Goals Framework:

View **goals state** on the overview tab

Click on individual goals to **drill down** and see details

Goals displayed in grid view with hierarchy

Grid provides the goal hierarchy view with an ability to drill down and personalize the columns

The screenshot shows a web interface for 'Portfolio plan for BUs - Goals'. The main title is 'Portfolio plan for BUs' with a subtitle 'Timeline: 2022-01-01 - 2023-12-31', 'Owner: Megan Burke', and 'Portfolio plan entities: Business Units: Sales, Marketing, HR, IT, Finance'. There are tabs for 'Overview' and 'Hierarchy'. A 'New goal' button is visible in the top right. The grid view shows a hierarchy of goals:

- Sales automation (3)
 - Reduce customer acquisition cost by 30% (Green, 33.33%)
 - Increase sales conversion rate by 50% (Yellow, 40%)
 - Decrease bid turnaround time by 50% (Green, 60%)
- Marketing automation (2) (Business Unit: Marketing)
 - Improve campaign results by 70% (Red, 28.57%)
 - Generate high quality leads by 40% (Green, 25%)
- Legacy modernization (1) (Business Unit: IT)
 - Implement RWD for 80% of all apps (Green, 50%)
- Improve employee onboarding (1) (Business Unit: HR)
 - Reduce onboarding time by 50% (Yellow, 66.67%)
- Finance automation (1) (Business Unit: Finance)
 - Roll-out ERP to 5 countries (Red, 16.67%)

Add a new goal

Personalize columns on the grid

Roll-up of progress from sub-items

Goal icon Target icon

Goal Framework hierarchy

ACME HR Department

Timeline: 2022-06-01 - 2023-09-30 | Owner: Megan Burke | Lens entities: Departments: HR

Parent goal	Name	Type	Lens entity: department	Status	Progress	Owner	Actual value	Base-Target
Happy Employees (1)	Improve Employee Satisfaction (1)	Goal	HR	Green	40%	Megan Bu...		
Improve Employee Satisfaction	Improve Employee Satisfaction Scor...	Target		Green	40%	Megan Bu...	80	76% - 86%
Improve Employee Satisfaction	Redesign Employee Compensation	Goal	HR	Yellow	16.67%	Megan Bu...		
Happy Employees (1)	Uplift Employee Onboarding (1)	Goal	HR	Green	33.33%	Abel Tuter		

- Create new sub-goal
- Set new target
- Align work
- Delete

Goals Framework:

Quickly **edit goals** by adding sub-goals, setting new targets, aligning work to goals

Create new Goal

The screenshot displays the ServiceNow 'Goals and Targets' interface for 'Acme Inc Goals'. The main view shows a table of goals with columns for Status, Progress, Actual value, and Base-Target. A 'New goal' button is visible in the top right corner. A modal form titled 'Goal' is open in the center, allowing users to create a new goal. The form includes fields for Name, Parent goal, Owner, Start date, End date, Planning Organization, and a rich text description field. A context menu is also visible at the bottom left of the modal, with options: 'Add new sub...', 'Add new target', 'Align work', and 'Delete'.

Status	Progress	Actual value	Base-Target
Green	41.69%		
Green	66.66%		
Green	0%		
Green	new		92% - 100%
Green	200%	70	60% - 65%
Green	16.67%		
Green	0%		85 - 100
Green	33.33%	6	4% - 10%
Green	13.11%		
Green	14.29%	4	3% - 10%
Yellow	25%	4	2% - 10%
Green	0%		
Green	0%		85% - 90%
Green	0%		20% - 27%
Green	58.34%		
Green	30%	78	75% - 85%

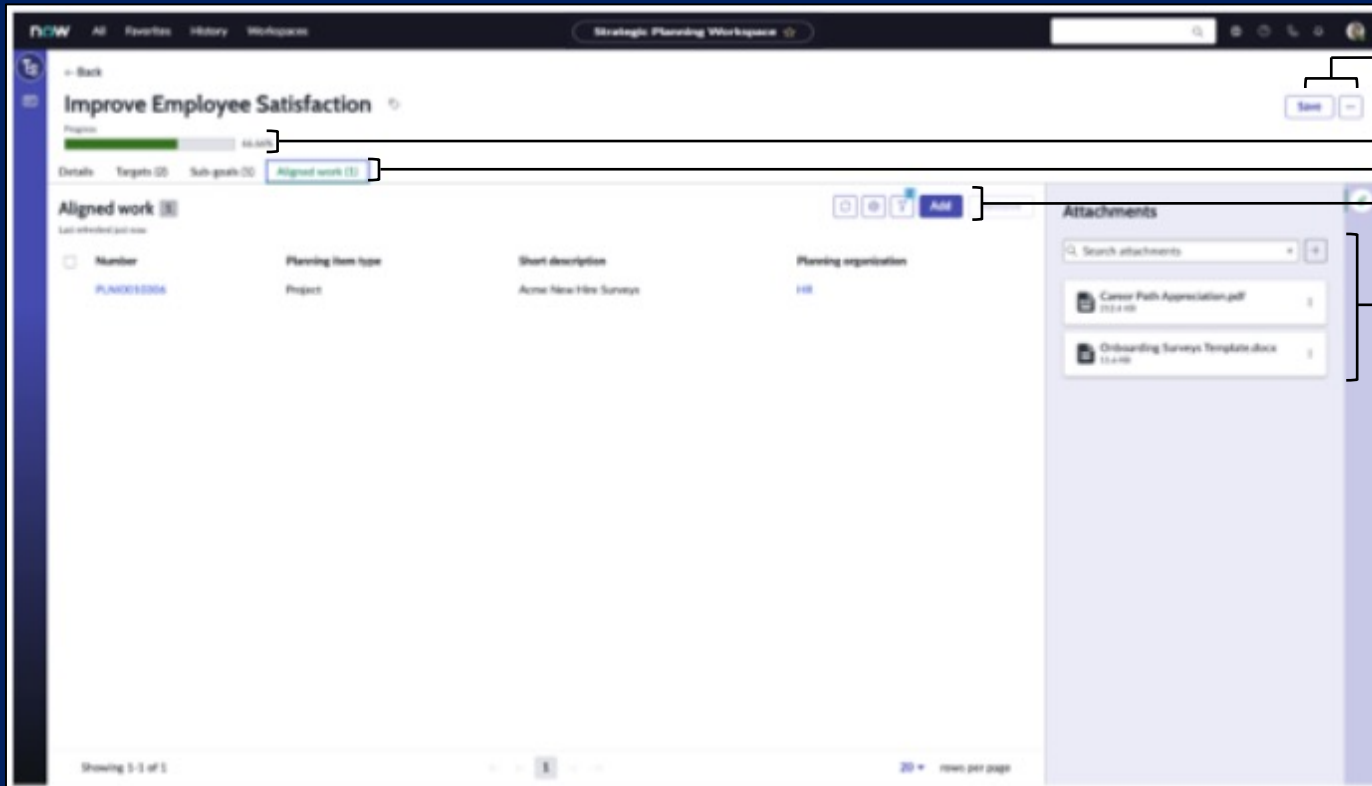
Add a Goal:

Add a goal or sub-goal through the 'New goal' button or the in-context menu via the ellipsis

Associate the goal to a planning organization [required] and a parent goal if desired

Goals information

Next Experience



Goal Full Details:

See progress roll-up of all targets

Add, view, and update all relevant details including goal fields, targets, sub-goals, aligned work, and attachments

Goal Framework for SPM

UX Enhancements

The screenshot displays the 'Enterprise Goals' page in ServiceNow. The interface includes a navigation menu on the left with 'Goals' and 'Planning' sections. The main content area shows a table of goals with the following columns: Name, Assigned entity, Status, Progress, Owner, Work items, Actual value, Base-Target, and Parent goal. A green box highlights the 'Assigned entity' column, which contains values like 'Department: IT', 'Portfolio: HR', and 'Company: ACM...'. The table also shows progress bars and status indicators (Green, Yellow) for each goal.

Name	Assigned entity	Status	Progress	Owner	Work items	Actual value	Base-Target	Parent goal
Build dynamic, costeffective, and business-C...	Department: IT	Green	0%	SA System Ad...	0			
Employee Offboarding		Green	33.2%	SA System Ad...	0			
Employee Onboarding (1)		Yellow	0%	SA System Ad...	0			
Employee Wellness (3)	Portfolio: HR	Green	0%	Megan Bu...	0			
Focus on people operations	Product Model: ...	Green	0%	Megan Bu...	0			
Happy Employees (1)	Company: ACM...	Green	8.34%	Megan Bu...	0			
Improve Employee Satisfaction (2)	Business Unit: ...	Green	8.34%	Megan Bu...	30			Happy Employ...
Improve EVS Score		Green	0%	SA System Ad...		85% - 92%		Improve Emplo...
Redesign Employee Compensation	Department: HR	Green	16.67%	Megan Bu...	1			Improve Emplo...
Hybrid Workforce Management Preparation	Portfolio: HR	Yellow	0%	Megan Bu...	0			
Inspire Customers (1)	Company: ACM...	Yellow	42.6%	SA System Ad...	2			
Improve Customer Retention (1)	Business Unit: S...	Green	42.6%	Megan Bu...	0			Inspire Custom...
To increase net profit by 10% an...	Department: Sa...	Yellow	42.6%	Megan Bu...	0			Improve Custo...
Leader in our Industry (2)	Company: ACM...	Green	16.64%	Megan Bu...	1			
Make your purpose and professional values ...	Department: HR	Green	0%	SA System Ad...	0			
Prioritize feedback from every angle	Initiative: HR & ...	Green	0%	SA System Ad...	0			
Pursue employee advancement (1)	Product Model: ...	Green	0%	SA System Ad...	0			
Reduce Operational Costs	Department: IT	Green	13.33%	SA System Ad...	2			

Goals Hierarchy UX Enhancements:

Visual icons distinguish goals from targets

Progress bar for goals and target

'Assigned Entity' column captures the related lens entity selection (i.e., Department: HR)

Goal Framework for SPM

UX Enhancements

The screenshot displays the ServiceNow Enterprise Goals interface. The main view shows a hierarchy of goals, including 'Inspire Customers'. A modal window titled 'Align work' is open, allowing users to link planning items to a goal. The 'Align work' modal includes a search bar for planning items and a table of aligned work items:

Planning item type	Planning item	Status	Percent complete
Demand	Search with Planning Item name or number		
<input type="checkbox"/>	Planning item ▾		
<input type="checkbox"/>	Customer Reference Module	Demand	Green 0
<input type="checkbox"/>	Sales Pipeline Predictive A...	Project	Green 64,98

Below the table, it says 'Showing 1-2 of 2'. A second modal window titled 'Edit List' is also open, allowing users to configure the columns displayed in the 'Align work' table. The 'Edit List' modal shows a list of available columns and a list of selected columns:

Available columns	Selected columns
Search	Planning item
Planning item type	Planning item > Planning item type
Primary goal	Planning item > Status
Program	Planning item > Percent complete
Project	Planning item > Owner
Table	Primary goal
Tags	
Updated	
Updated by	
Updates	

Goals - Align Work:

Hyperlinked work items which open planning items in a new tab

Configurable columns in the 'Align Work' module including ability to "dot walk"

Goal Framework for SPM

UX Enhancements

The screenshot displays the ServiceNow 'Enterprise Goals' interface. A modal window titled 'Goal' is open, allowing for the creation of a new goal. The form includes the following fields:

- Name ***: Increase Employee Satisfaction
- Parent goal**: Employee Wellness
- Owner**: System Administrator
- Start date**: 2022-10-01
- End date**: 2023-12-01
- Assigned entity type**: Business Unit (selected from a dropdown menu)
- Assigned entity ***: HR
- Impact on parent goal**: (2) Moderate

The background shows a list of existing goals with columns for Name, Owner, Actual value, Base-Target, and Parent goal. A table of goal metrics is also visible at the bottom of the screen.

Owner	Actual value	Base-Target	Parent goal
SA System Ad...			
SA System Ad...			
SA System Ad...			
Megan Bu...			
SA System Ad...	83% - 93%		Employee Well...
SA System Ad...			Define Metrics Employee Well...
SA System Ad...			Employee Well...
Megan Bu...			
Megan Bu...			
Megan Bu...			
Megan Bu...			
Megan Bu...			
SA System Ad...			
SA System Ad...			
SA System Ad...			
SA System Ad...			
SA System Ad...			

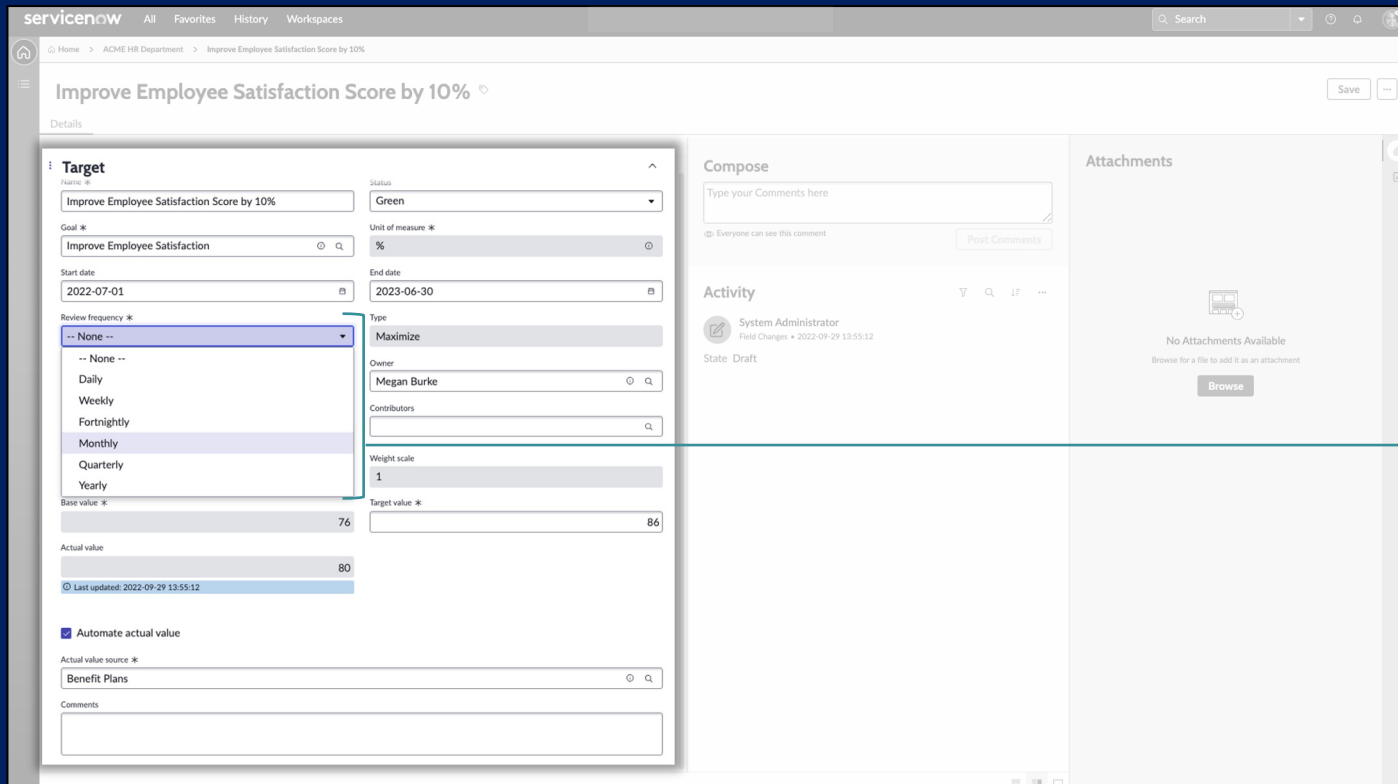
Department	Actual	Target	Progress	Weight
Department: HR	Green	0%	0	0
Initiative: HR & Emplo...	Green	0%	0	0
Product Model: ACM...	Green	0%	0	0
Department: IT	Green	13.33%	2	2

Goal Creation Form:

New “Assigned Entity Type” field simplifies relating lens entities to goals on the goal creation form

The drop-down values in the ‘Assigned Entity’ field are populated based on the ‘Assigned Entity Type’ selection

‘Weight’ has been renamed to ‘Impact on parent goal’ and number values now have been appended: (0) No Impact, (1) Neutral, (2) Moderate, (3) High, (4) Very High, (5) Maximum



Advanced Goals Framework:

Automate the collection and aggregation of actual values based on:

- Benefit Plans
- Surveys and Assessments
- Performance Analytics Indicators

Select the review frequency for pull updates

View the 'Last updated' to see when the actual value was last pulled