SPM Release Enablement

Formerly known as release delta training

2026 July to September Store release

servicenow

Strategic Portfolio Management (SPM) Value Evolution

55+ Major Innovations

6 Family Releases

12 Store Releases

2024 Q1 & Q2 — Washington D.C

- Now Assist for SPM: Feedback Summarization & Demand Creation
- Enterprise Agile Planning
- Actionable Resource Management Workspace
- Resource Boards: Export to Excel/CSV
- Associate Work to Targets - SPW
- Next Experience Dashboards (Project Workspace & SPW)
- Projects Source to Pay Ops Better Together Story
- Migration to Attribute-Based Resource Plans
- Business Capability Lens - EA + SPM Better Together
- Launch of CWM

2024 Q3 & Q4 — Xanadu

- Now Assist for SPM: Email Project Summary
  Full-Doc Summarization and Multi-Feedback Summarization
- Project Status Reports in Docs
- Goal Framework: Target Check-ins and Progress Visualization
- Scenario Planning: Trade-off Analysis, Compare Scenarios & Approve Scenarios
- Export Roadmap to PowerPoint
- RMW & PWS: View Actuals vs Planned Resource Assignments
- Docs in PWS, EAP, Strategic Planning
- Migration Path for SAFe to EAP

2025 Q1 & Q2 — Yokohama

- **Now Assist for SPM:** Writing Planning Item, Enhanced Story Generation
- Scenario Planning for Financials
- Dashboards in RMW and SPW
- RMW - Extend Resource Request & Edit Groups
- PW – Copy/Duplicate Status Reports
- EAP - Integration with Jira & ADO workaround, Kanban Configurations
- CWM Updates
- Now Assist for SPM powered by AI
- Agents: Monitor Project Tasks
- Now Assist for SPM: Story Generation in EAP
- Portfolio Financials
- Benefits planning in SPW
- Digital Product Lens
- SPM + Impact Better Together
- SPM + Opportunity Market Place Better Together
- SPM Docs – Real time collaboration
- Project Workspace – Checklists (project & task level), Read-Only View for Project Status Reports
- Resource Management: Enhanced allocation modal based on resource utilization and Group by with allocation roll-up
- CWM Updates: Impact + CWM

2025 Q3 & Q4 — Zurich

- Now Assist in SPM:
  - Identify Similar Records for Demands
  - Acceptance Criteria Generation
  - Target Generation
- Playbooks in Project Workspace
- EAP & Jira integration
- Multi-currency in New Financials
- EAP & CWM Connection
- Demand Conversion to EAP entities
- SPW – Configurable Roadmaps, Sharing Portfolio, VoC enhancements
- Status Reports – States & Copy Reports
- Benefit Planning
- Labor Cost Plans in sub-projects & planning items
- RMW – Assigning resources in unassigned resources, realignment resource option, data grid filtering, work notes and resource rate editable
- AI Strategy in AI Control Tower
- Agile Sprint Planning in CWM
- Connected Work in CWM
- Financials on Planning Items
- New display modes in Financials
- UX Enhancements on Roadmap in SPW
- Create resource board in RMW & PW
- Move Resource Capability in RMW & PW
- Add Hover States for Resource Modifications in PW & RMW
- Rate model support for planning items in RMW
- Third Party LLM Model connections
- Improved Project Email Insight Now Assist Skill

2026 Q1 & Q2 — Australia

- Demand manager AI specialist
- Portfolio Insights
- Project Risk Detection
- Epic health status
- Enhanced Goal Insights
- Enhanced Project Insights
- Enhanced Project Status Reports
- Enhanced Demand Summarization Skill
- AI Project Status Reports
- Goal Level Insights
- Demand AI Summary
- In-App Project Insights + Enhanced Email
- Quick Story Generation from Epics
- Enterprise Strategy & Goals V1.0
- Demands New UX V1.0 with Playbooks
- Better Together with ITAM
- SPW Hierarchy & Kanban Views
- Goals – Delegate KRs & Targets
- EAP Usability + Hierarchy View
- Multi-Currency Baselines
- Resource Management Enhancements

2026 Q3 — Brazil

July 2026

- Portfolio AI Insights Expansion
- AI Project Plan Generation
- Project Q&A Enhancements
- Automatic Goal Status Calculation

August 2026

- Demands Dashboards
- RIDAC Governance Across SPW
- AI Identified Risks Enhancements
- Conversational Demand Creation
- Executive Tab with Demand Summary
- Similar Demands Detection
- Demand Workspace Financial Grid
- Hybrid Project Management

September 2026

SPM MCP Server General Availability

- EWD – Hardened Security Plugin and Tailored Layouts by Partition
- Programs in L1 Portfolio Plans
- RIDAC

SPM Overview of Major New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
MCP for SPM	Strategic planning moves to where your teams already work. Live data in AI clients. No more manual dashboards. Decisions happen faster because context switching stops.	Portfolio managers make faster risk calls. Project teams spend less time on status reports, more on delivery. Leadership gets real-time insights instead of day-old spreadsheets.
Dashboards in Demands Strategic Planning Workspace Portfolio Planning Workspace	New dashboard view with demand analytics, data quality metrics, and a customizable bubble chart	Replace static workbench views with a living, editable picture of your demand portfolio
Hybrid Project Management Project Workspace Collaborative Work Mgmt	Project managers plan and govern in Project Workspace while team members view, update, and break down their assigned work in CWM — with both sides staying automatically synchronized in real time.	Project managers maintain full plan visibility without chasing status updates, and team members work in their preferred environment without needing access to Project Workspace.

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
AI Demand Summarization Strategic Planning Workspace Portfolio Planning Workspace	Cleaner AI Overview tab in the new workspace; also available in classic UI	Faster context on any demand without reading through the full record
Identify Similar Demands Strategic Planning Workspace Portfolio Planning Workspace	AI flags contextually similar demands (85% threshold) surfaced as a banner and related list on the demand record	Catch duplicate or overlapping demands before they progress through the review cycle
Customizable Summarization in Demands Strategic Planning Workspace Portfolio Planning Workspace	Admins can edit which fields feed the summary and clone/modify the prompt	AI output reflects your organization's priorities, not a fixed template

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
Financial Grid in Demands Strategic Planning Workspace Portfolio Planning Workspace	Now available inside Demand Workspace, consistent with Project Workspace	Manage demand financials without switching contexts or tools
My Demands Widget Strategic Planning Workspace Portfolio Planning Workspace	Requesters can add a demand tracker directly to their employee portal canvas	Full visibility into submitted demands without needing to contact the demand team
Conversational Demand Creation Strategic Planning Workspace Portfolio Planning Workspace	Natural language demand creation via Moveworks; auto-populates form fields and surfaces related catalog items	Reduces incomplete or duplicate submissions before they reach the demand manager

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
Automatic Target Status Calculation Strategic Planning Workspace	Target status is now automatically calculated when actuals are entered, eliminating manual status selection and ensuring every check-in period has a consistent, populated status.	Improved data quality and governance across goal reporting, giving leaders a reliable, real-time view of target health without manual intervention.
Project Plan Generation — Performance & Accuracy Project Workspace	AI model tuning and prompt refinement deliver more accurate project plans from uploaded documents, reducing the gap between what's in your files and what gets generated.	Project managers spend less time correcting AI-generated plans and more time executing them.
Milestone Extraction Project Workspace	Milestones referenced in uploaded documents are now automatically identified and pulled into the generated project plan — no manual re-entry required.	Key delivery markers from existing documentation are preserved in the project plan without additional effort from the project manager.

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
Plan Review Stage Project Workspace	A review step is added before project creation, letting users inspect how uploaded content maps to the plan structure and adjust before committing.	Project managers catch mapping gaps and scope issues before the project is created, reducing rework after generation.
Dynamic Content in Docs Project Workspace	Live project data, fields, and tables can now be pulled directly into project docs using a backslash trigger — extending what was already available in status reports.	Project documentation stays current with the plan automatically, removing the manual effort of keeping docs and project data in sync.
Edit Projects in List View Project Workspace	Projects can now be edited inline directly from the list view, without navigating to the details page for each record.	Project managers make routine updates faster and stay oriented within the full portfolio view rather than losing context navigating away.

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
Portfolio AI Insights - Projects at Risk Project Workspace	AI now surfaces projects with underlying issues — delayed tasks, resource bottlenecks, financial pressure — before those issues cause visible schedule delays.	Portfolio managers can intervene earlier, with root cause context and recommended actions, before risks escalate into delays.
Portfolio AI Insights - Items Forecasting Over Budget Project Workspace	AI identifies planning items where forecast is exceeding approved budget and surfaces root causes across labor, rates, and non-labor cost plans.	Portfolio managers pinpoint cost overrun drivers earlier, reducing the time spent manually reviewing cost plans across the portfolio.
Portfolio AI Insights - Enhanced AI Insights Panel Project Workspace	The insights panel is now expandable to a full view, regenerable on demand, and includes a per-insight info icon explaining the underlying methodology.	Portfolio managers access deeper insight detail and understand exactly what data is being analyzed, improving confidence in AI-surfaced recommendations.

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

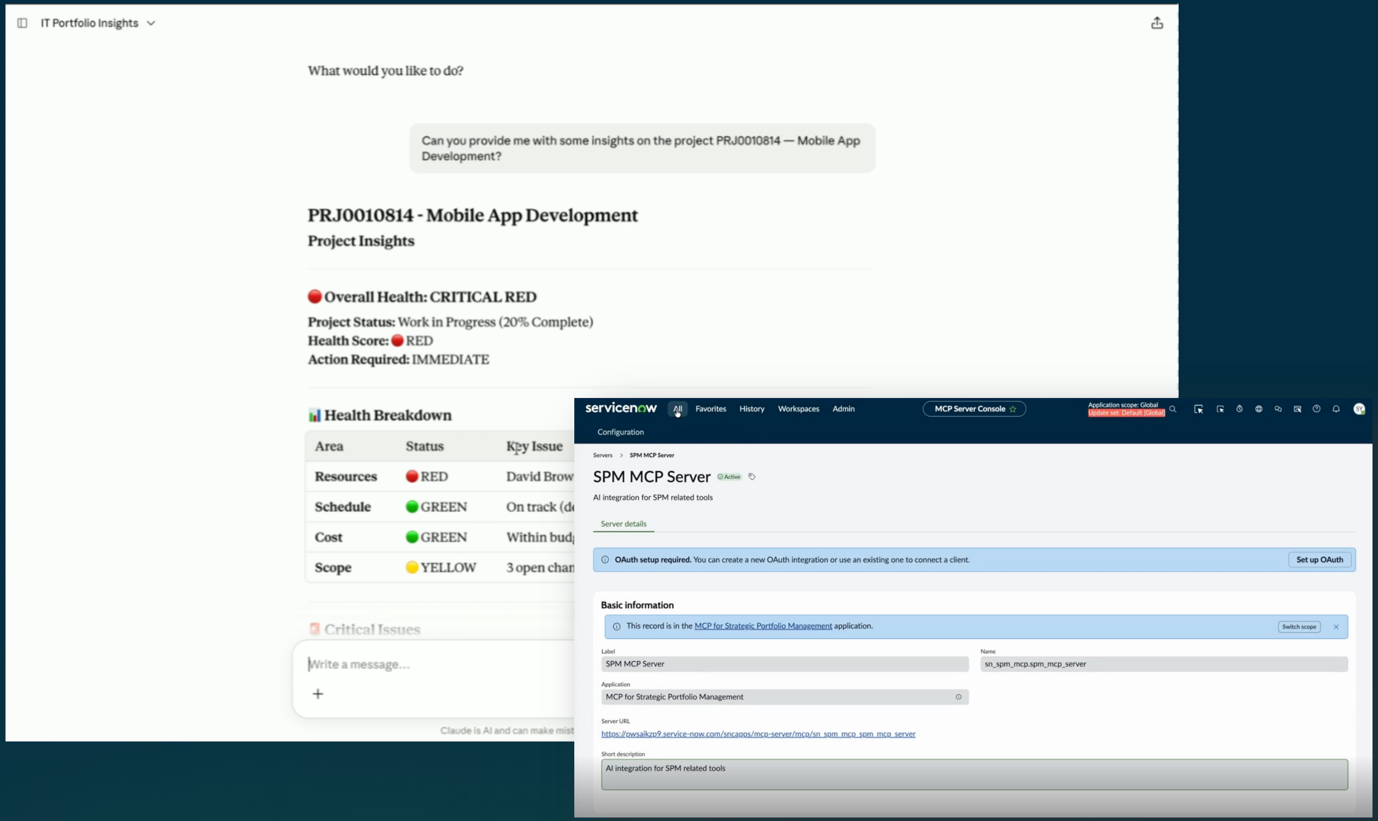
New Feature/ Enhancement	What's changed	Business Outcomes
RIDAC by Type Project Workspace	RIDAC navigation is reorganized into separate tabs per type — risks, issues, decisions, actions, change requests — with inline editing and multi-row actions replacing the grid layout.	Project managers find and update RIDAC items faster, with fewer clicks and without opening individual records for routine changes.
RIDAC as Related Lists Project Workspace	RIDAC is now available as a related list on demands, epics, features, and iterations — extending visibility beyond projects to the full delivery hierarchy.	Teams managing agile and hybrid delivery track risks and issues directly on the records where work is happening, without switching contexts.
Admin Access Control for Partition Data Enterprise Wide Deployments (EWD)	System administrator access to partition data is now off by default — explicit partition role assignment is required before access is granted	Organizations maintain tighter governance over partition data visibility, ensuring admins access only the data they are explicitly authorized for.

SPM Overview of Minor New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
Extended Security for EWD Partitions Enterprise Wide Deployments	A new store application adds ACL-based security on top of existing partition role-based access, providing a second layer of data control for enterprise deployments.	Organizations with strict data separation requirements can enforce partition boundaries at the record level, not just at the role level.
Programs in SPW Strategic Planning or Portfolio Planning	Existing legacy programs now appear as a new L1 option in Strategic Planning Workspace, with a portfolio plan automatically created for each program.	Legacy program users access modern SPW functionality without manual setup, making the transition incremental rather than requiring an all-at-once migration.

MCP for SPM



$ Advanced and/or Prime

Portfolio intelligence without leaving chat—same ServiceNow governance, live from your AI client

1. Ask your portfolio questions in AI Client (Claude, Copilot etc) and get answers instantly, same ACLs and audit trail enforced
2. Get AI-powered project & portfolio risk detection and recommendations that run domain logic on ServiceNow, not guesses from the model - governance validated at every step
3. Generate status reports in chat with stakeholder ready answers – role-based visibility, full audit and no context switching required

Today, the SPM MCP Server spans use cases for goals, portfolio plans, and projects

What it can to today

What that means in practice

Strategic Planning: Goals Framework

✓ Retrieve goals and objectives for any owner, timeline, or status

✓ Generate AI-powered insights on goal health, targets, aligned work, and risks

✓ Answer "What is the state of this OKR and what should I do about it?" in one query

TOOLS: get_goals, generate_goal_insights

PRODUCT MANAGER / GOAL OWNER

"What is the state of this OKR and what should I do about it?"

Goal health surfaced → summary of goal and targets → aligned work flagged → recommendations for overcoming risks

Strategic Planning: Portfolio Management

✓ Retrieve portfolio plans with flexible filtering by owner or timeline

✓ Generate AI-powered portfolio insights in natural language for executive conversations

✓ Surface at-risk projects, delayed start and end dates, and misalignments across the portfolio

TOOLS: get_portfolio_plans, generate_portfolio_insights

PORTFOLIO MANAGER / PRODUCT MANAGER

"Show me our Q3 portfolio plans. Which projects are at risk and what dependencies are misaligned?"

At-risk projects identified → delayed starts and ends flagged → dependency misalignments surfaced for action

Project Management

✓ Retrieve projects by owner, timeline, or status and analyze status trajectory

✓ Detect project risks, surface recommendations, and identify RIDAC gaps

✓ Generate Red, Amber, Green (RAG) status reports across resources, cost, schedule, and scope from live project data

TOOLS: get_projects, generate_project_insights, identify_project_risks, get_ai_status_report

PROJECT MANAGER

"What's the health of my Q3 implementation project? What risks should I focus on?"

Status trajectory analyzed → RIDAC risks detected and saved as AI drafts for review → RED/AMBER/GREEN status across cost, schedule, scope, and resources

MCP for SPM

Fact Sheet

Why we added it

SPM MCP moves live strategic data into those tools instead of forcing you to tab back to dashboards for every decision.

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)
- Project Workspace (*SPM Adv Licensing*)
- MCP for SPM

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Project Manager

Technical

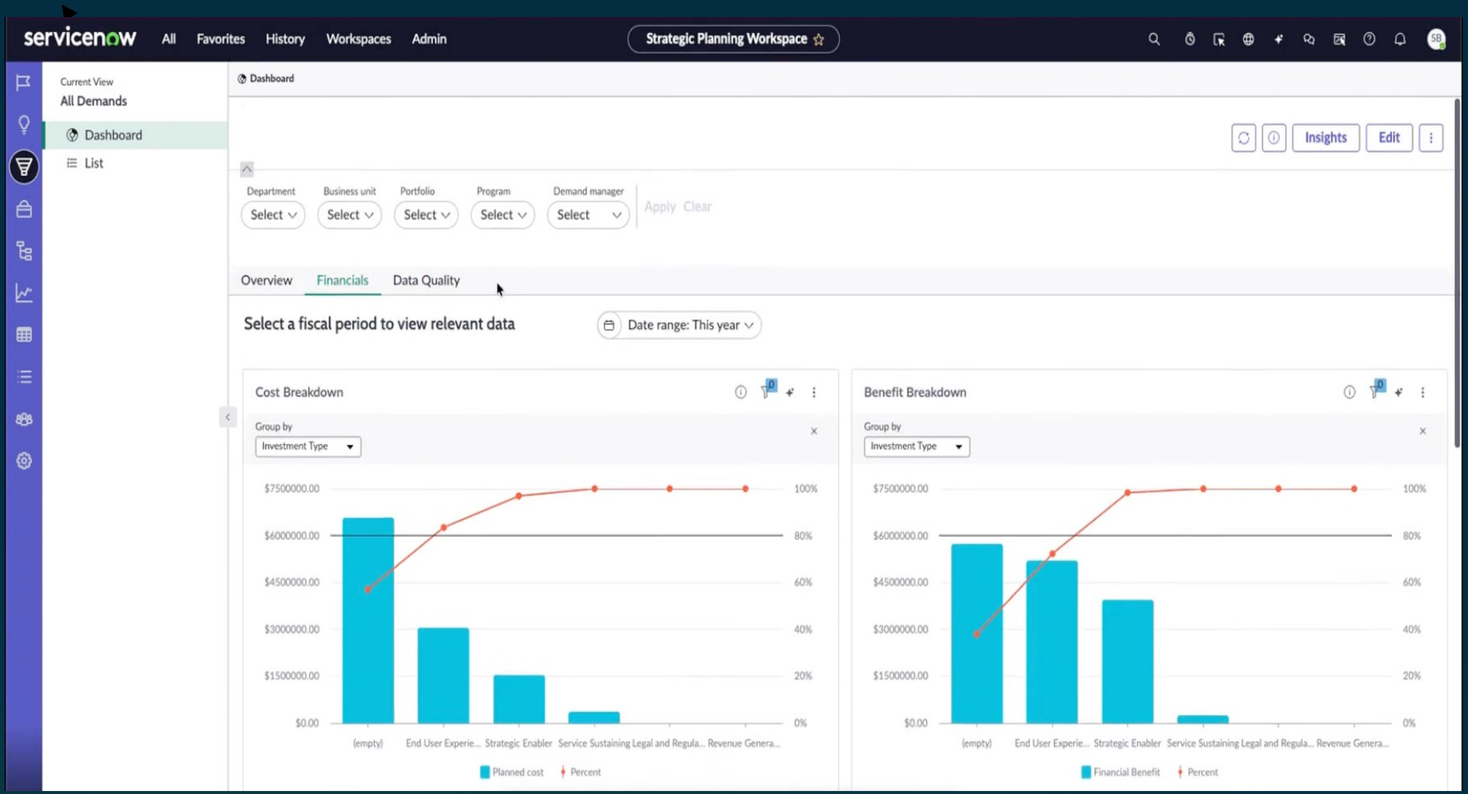
Pre-built MCP server connecting your AI client to ServiceNow via OAuth. Live data, user-by-user access control, full audit trail. No raw API wrappers. No DIY infrastructure.

Before / After

Before: Create custom MCP to integrate AI Clients with ServiceNow SPM

After: Now, use the OOTB to access SPM data in AI Client of preference

Demand Management Enhancements



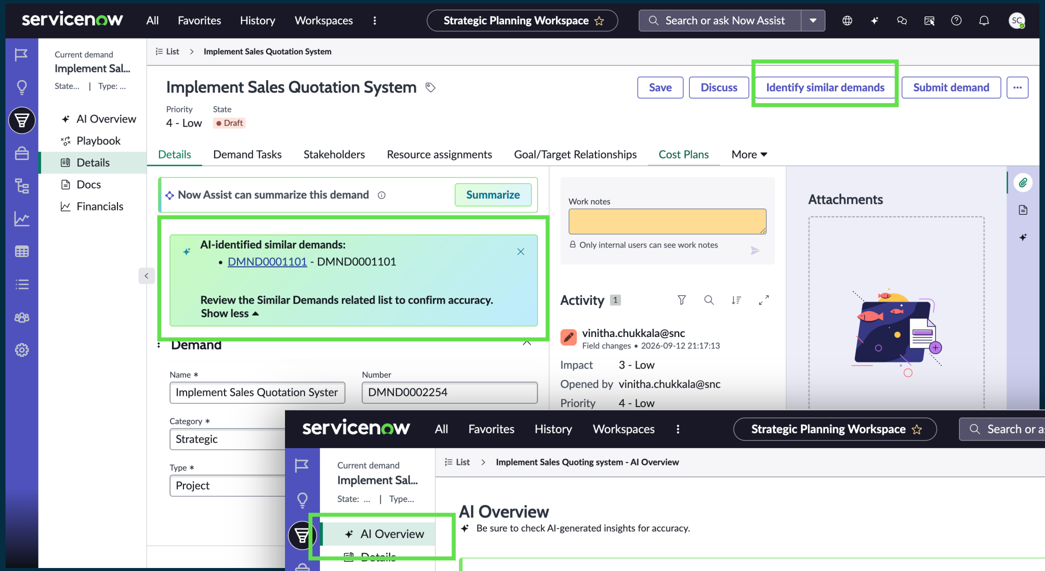
$ Advanced and/or Prime

Demand management that keeps every stakeholder informed, from intake to execution

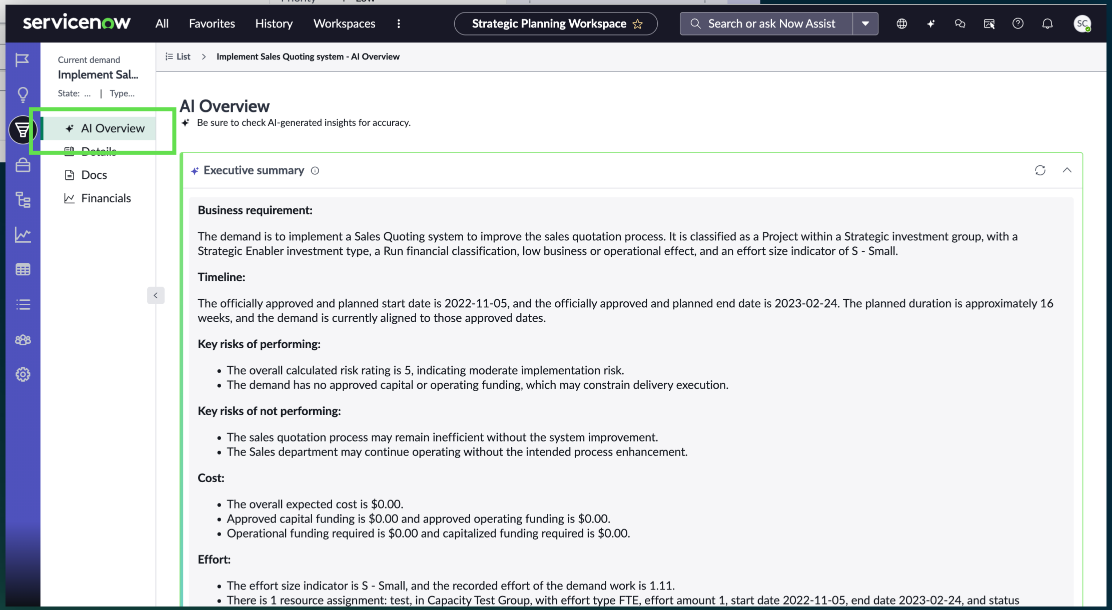
1. Manage demands end-to-end with greater confidence — from consistent financial planning and AI-assisted summarization, to requesters who can track their own submissions without needing to ask
2. Eliminate the gaps that slow demand teams down — disconnected financial views, manual effort to interpret demand context, and requesters who don't know where their request stands.
3. Empower every stakeholder in the demand lifecycle — portfolio managers get financial and analytics parity with projects, demand managers get AI-assisted context on every record, and requesters get visibility into their submissions from intake through execution.
4. **Reduce** time spent on status updates, manual financial tracking, and incomplete submissions — so demand and portfolio managers can focus on evaluation and prioritization rather than administration.

AI-Powered Demand Intelligence

Similar Demands

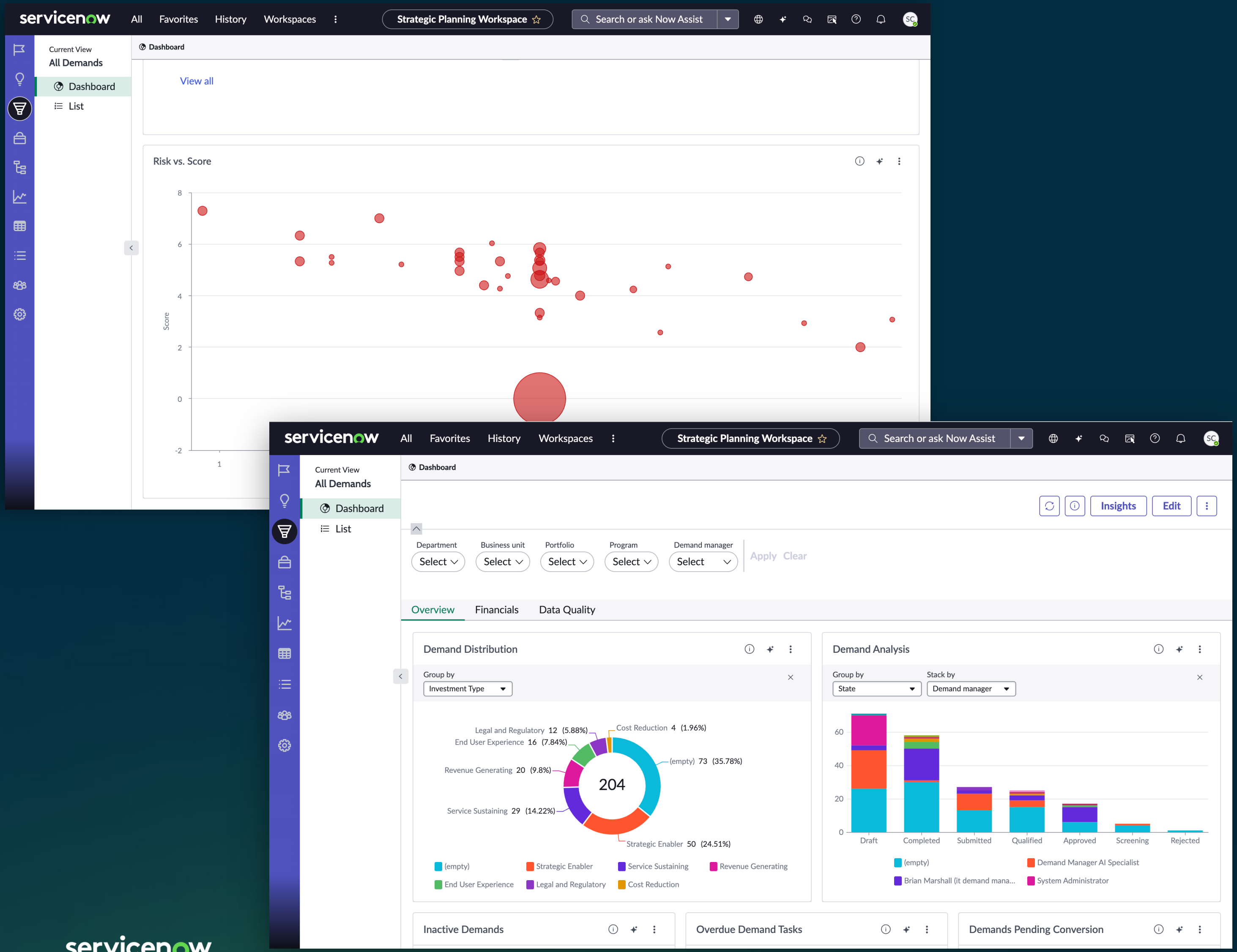


Demand Summarization



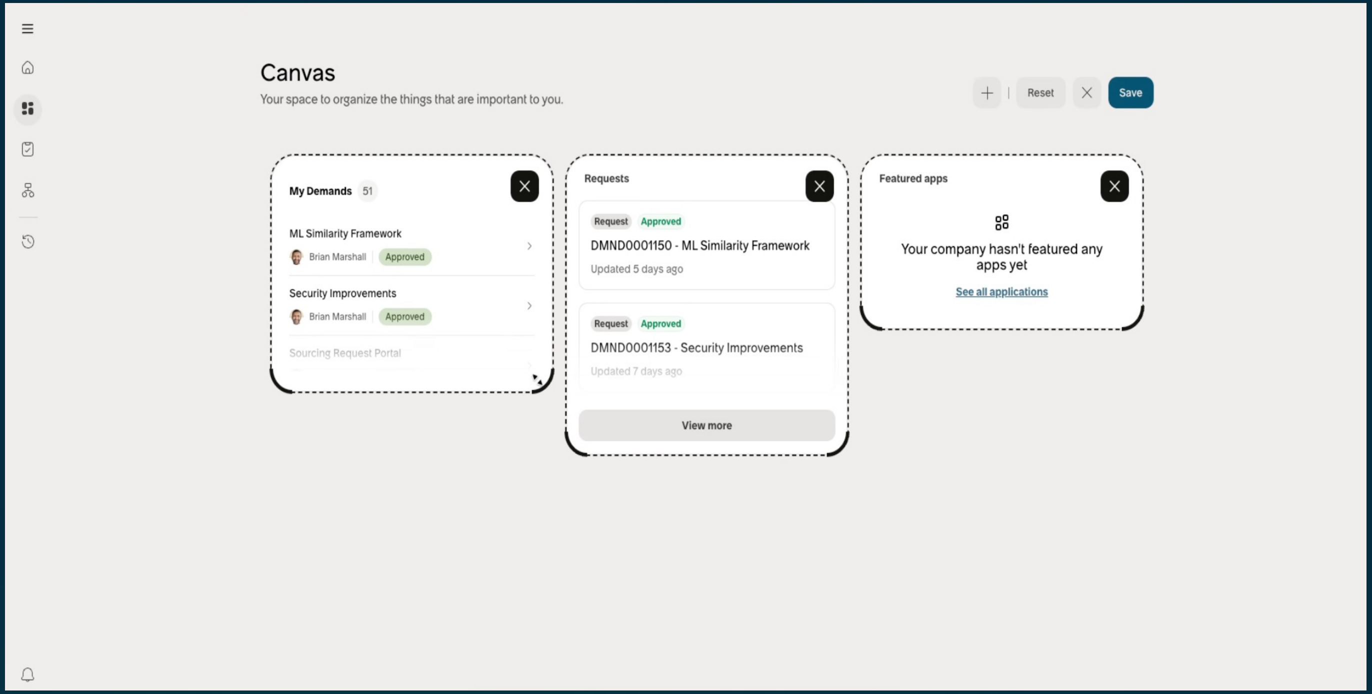
- **Get instant** context on any demand through a cleaner AI Overview tab, without having to read through the full record history or chase down the original requester.
- **Identify** potentially duplicate or overlapping demands before they progress through the review cycle, using AI that compares name, description, and business case content at an 85% similarity threshold.
- **Customize** which fields feed into the AI summary and clone the prompt to match your organization's language, so AI output reflects your priorities rather than a fixed template..

Demands - Financial & Analytics Parity



- **Manage** demand financials directly inside the demand workspace using the same grid experience already familiar from Project Workspace — no context switching or tool juggling required.
- **Replace** the static demand workbench with a fully editable dashboard that covers financial data, data quality metrics, and portfolio distribution — all in one configurable view.
- **Reconfigure** the bubble chart to surface the dimensions that matter most to your team, giving each portfolio manager a view tailored to their priorities rather than a fixed default.
- **Compare** demands and projects on equal financial footing, with a consistent grid experience across both that reduces the learning curve and makes cross-portfolio analysis straightforward.

Demands - Requester Empowerment



- Empower requesters to track their own demands — including lifecycle stage and post-conversion project status — directly from their employee portal, without contacting the demand team for updates.
- Reduce incomplete submissions by guiding requesters through demand creation conversationally via Moveworks, auto-populating fields and surfacing related catalog items before a form is submitted.
- Add a My Demands widget to the employee portal canvas so requesters always have a live view of everything they've submitted, its current state, and what it has converted into.
- Cut status-chasing conversations for demand managers by giving requesters direct visibility into where their demand stands at every stage of the lifecycle.

Demand Management Enhancements

Fact Sheet

Why we added it

Demand managers and portfolio managers were managing financial data for demands in a separate context from the rest of SPM. The old demand workbench provided a static bubble chart and list view with no ability to customize columns or edit the chart itself. Customers using the workbench had limited options for tailoring the view to their portfolio's priorities, and there was no financial grid equivalent to what existed in Project Workspace — creating an inconsistent experience across the platform

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)
- Moveworks??

Licensing

SPM Advanced

Who to target

Portfolio Managers
Demand Managers

Technical

XXX

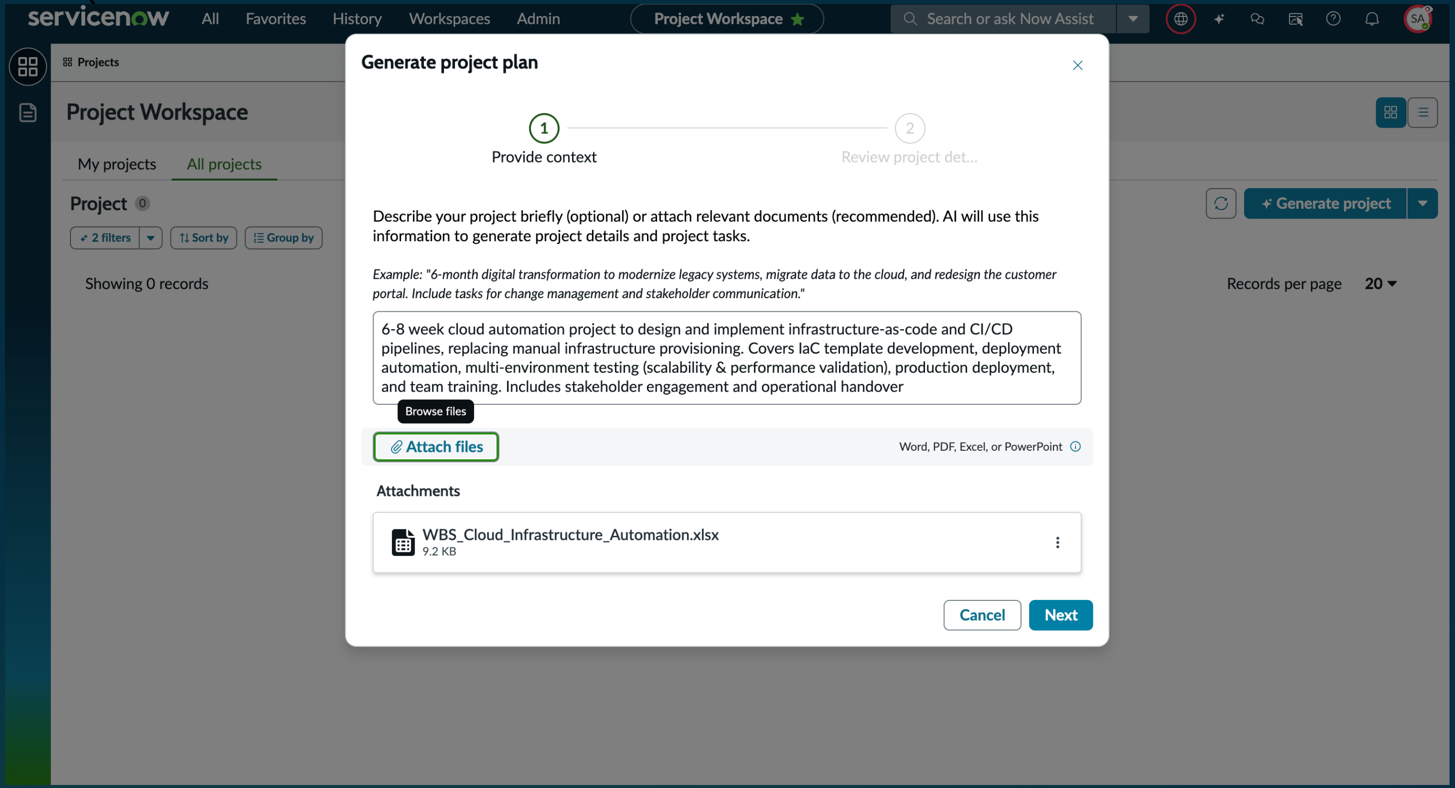
Before / After

Before: No financial grid in demand records; managed separately. Static demand workbench with fixed bubble chart columns. Bubble chart columns could not be changed

After: Financial grid available directly on the demand record, consistent with Project Workspace. Editable platform dashboard with configurable bubble chart and demand analytics. Columns, dimensions, and dashboard layout fully configurable per team

Project Workspace Enhancements

Powered by ServiceNow Otto



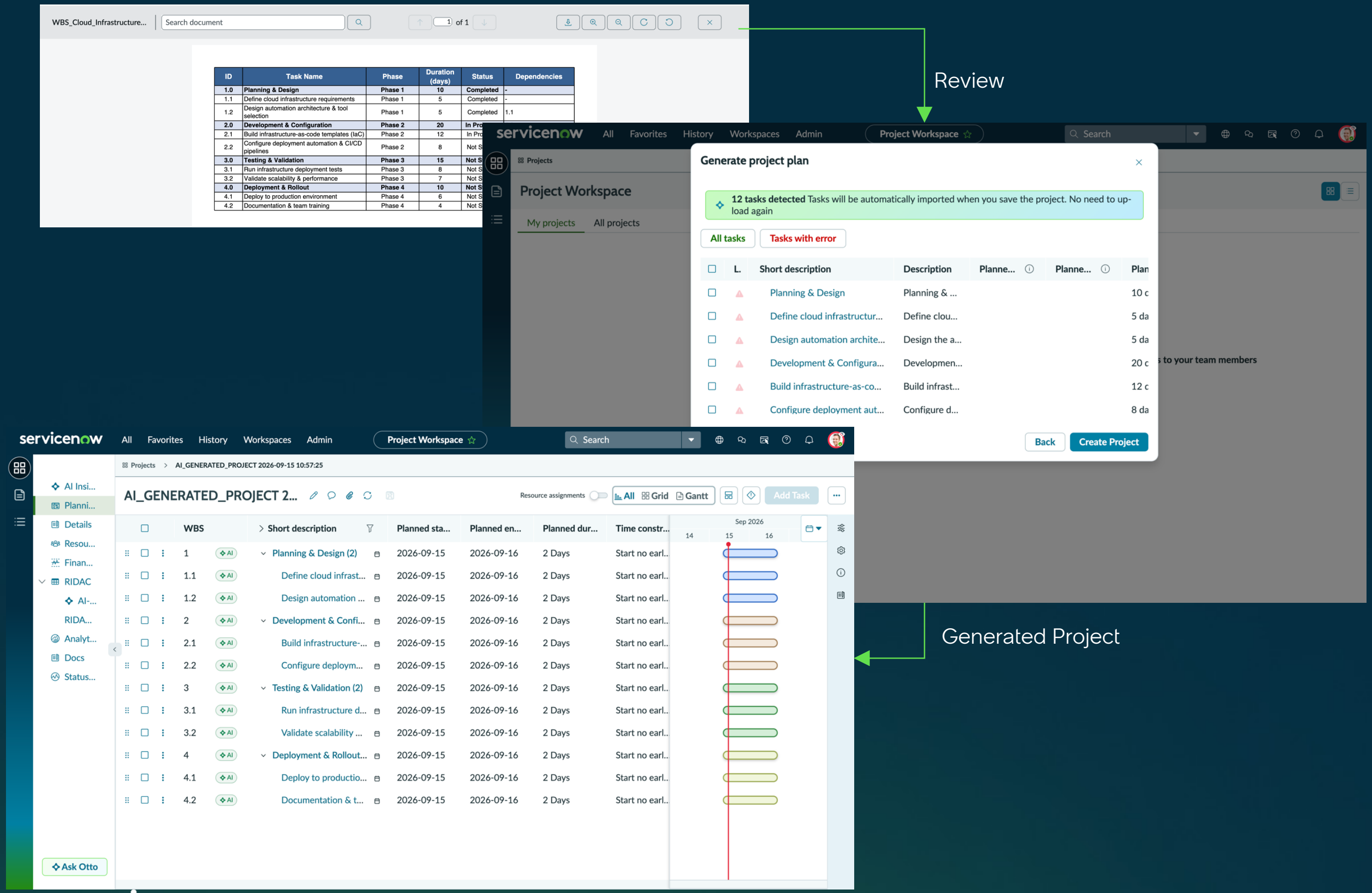
$ Advanced and/or Prime

Spend less time setting up projects and more time running them

1. **Generate a structured project plan** from documents your team already has — Word, PDF, Excel, or PowerPoint — with phases, tasks, and milestones extracted automatically, so project managers are not starting from a blank slate.
2. **Review how uploaded content maps** to the project structure before anything is created, giving project managers control to adjust scope and correct any gaps before committing — reducing rework after the fact.
3. **Add Dynamic content on Project Docs and edit list view of Projects – providing users better usability**

Project Plan Generation — Performance & Accuracy

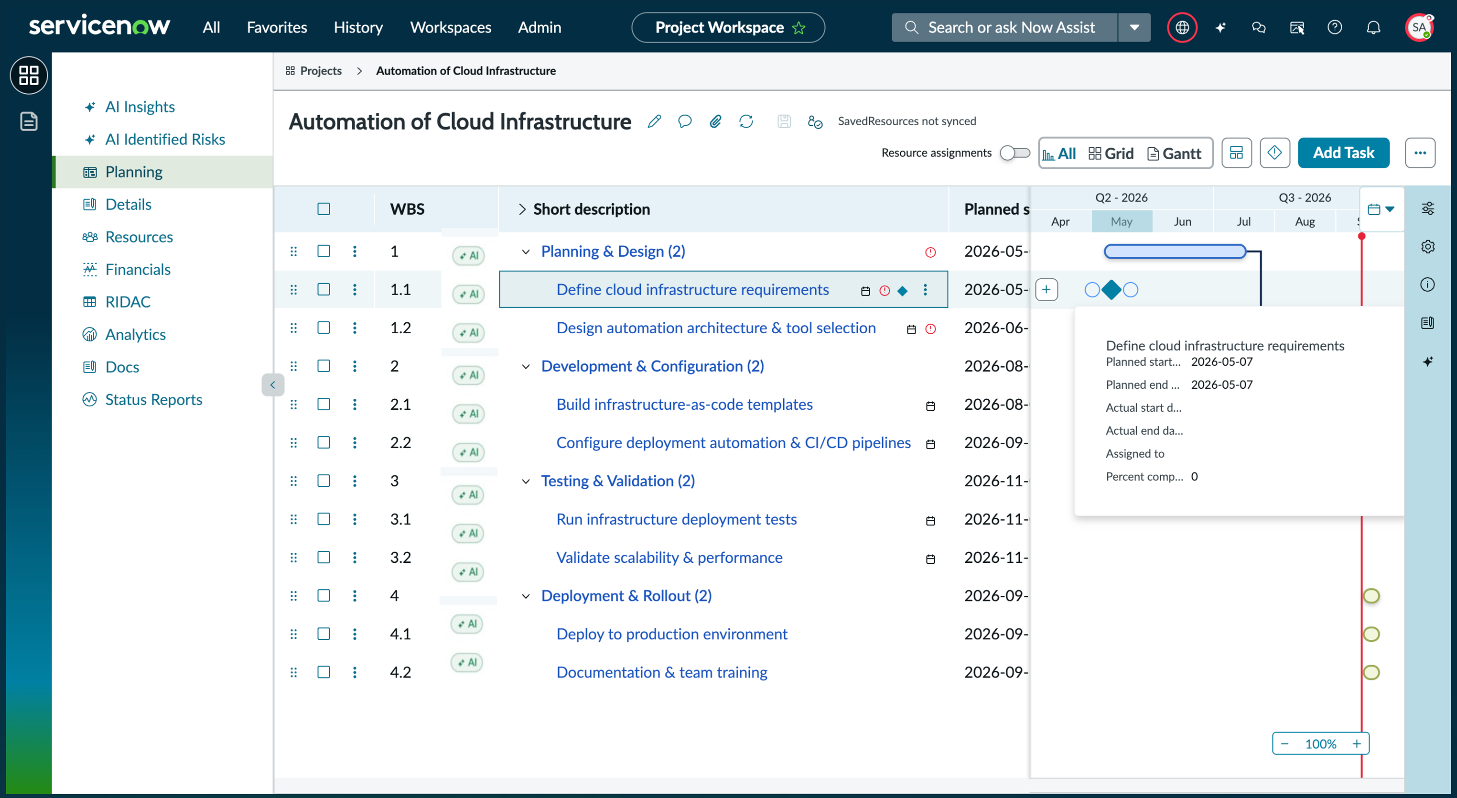
Powered by ServiceNow Otto



- **Upload** existing project documentation — Word, PDF, Excel, or PowerPoint — and receive a structured plan with phases, tasks, and dependencies generated automatically, without starting from a blank slate
- **Reduce manual setup time** by letting AI interpret unstructured content from documents your team already has, rather than re-entering information that exists elsewhere
- **More accurate outputs** as continued model tuning and prompt refinement improve how uploaded content translates into a structured project plan

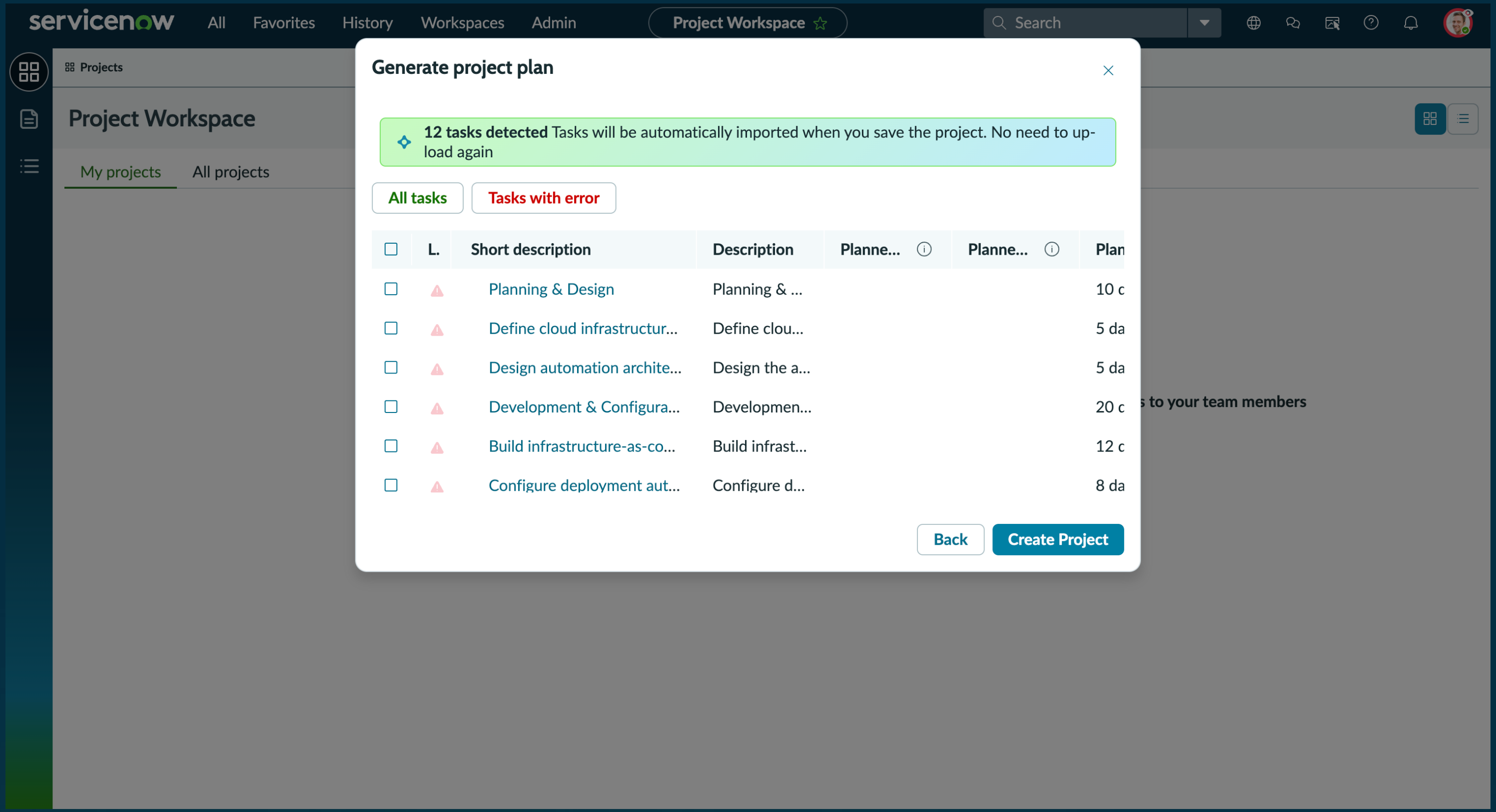
Milestone Extraction

Powered by ServiceNow Otto



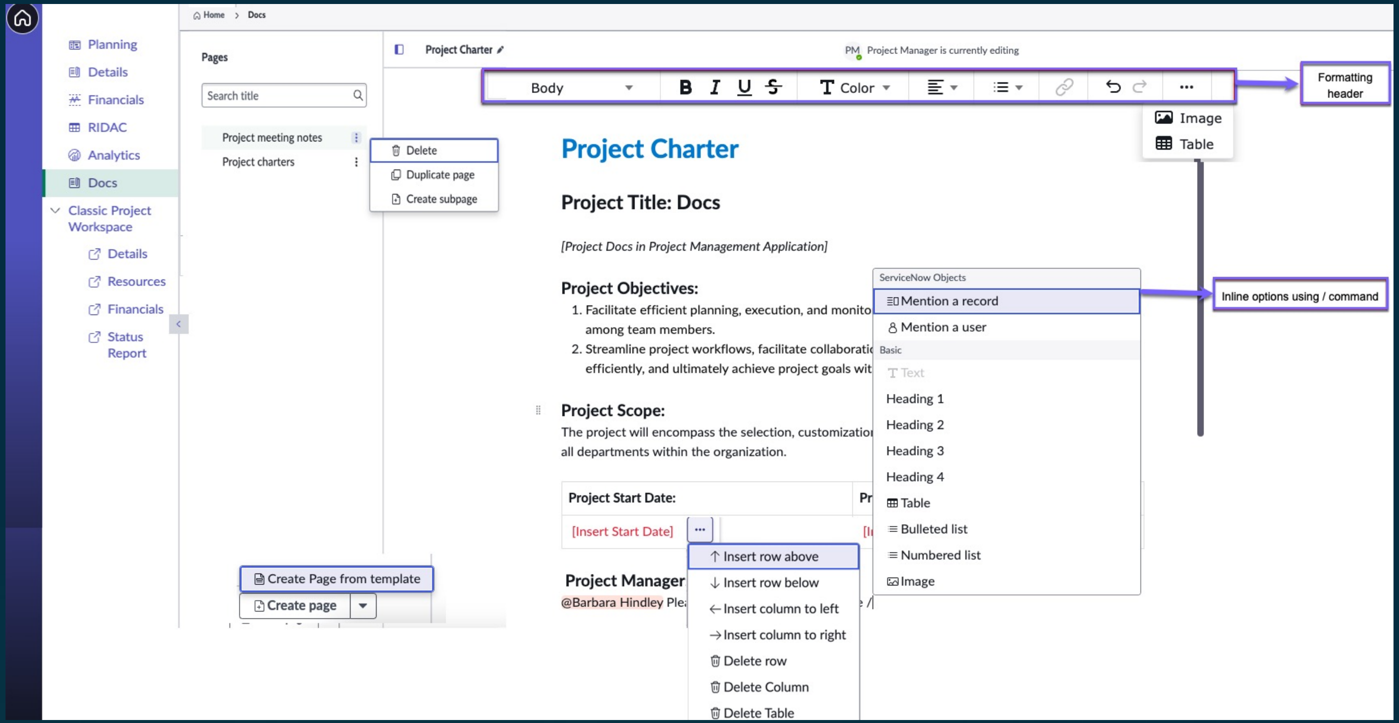
- Capture milestones automatically from uploaded documents — if your documentation references milestones or key milestones, they are pulled directly into the generated project plan without manual identification
- Preserve the intent of your source documents by ensuring key delivery markers are not lost in translation when moving from unstructured files into a structured project plan
- Save the review step of manually checking whether critical milestones were included — the system surfaces them as part of generation

Plan Review Stage



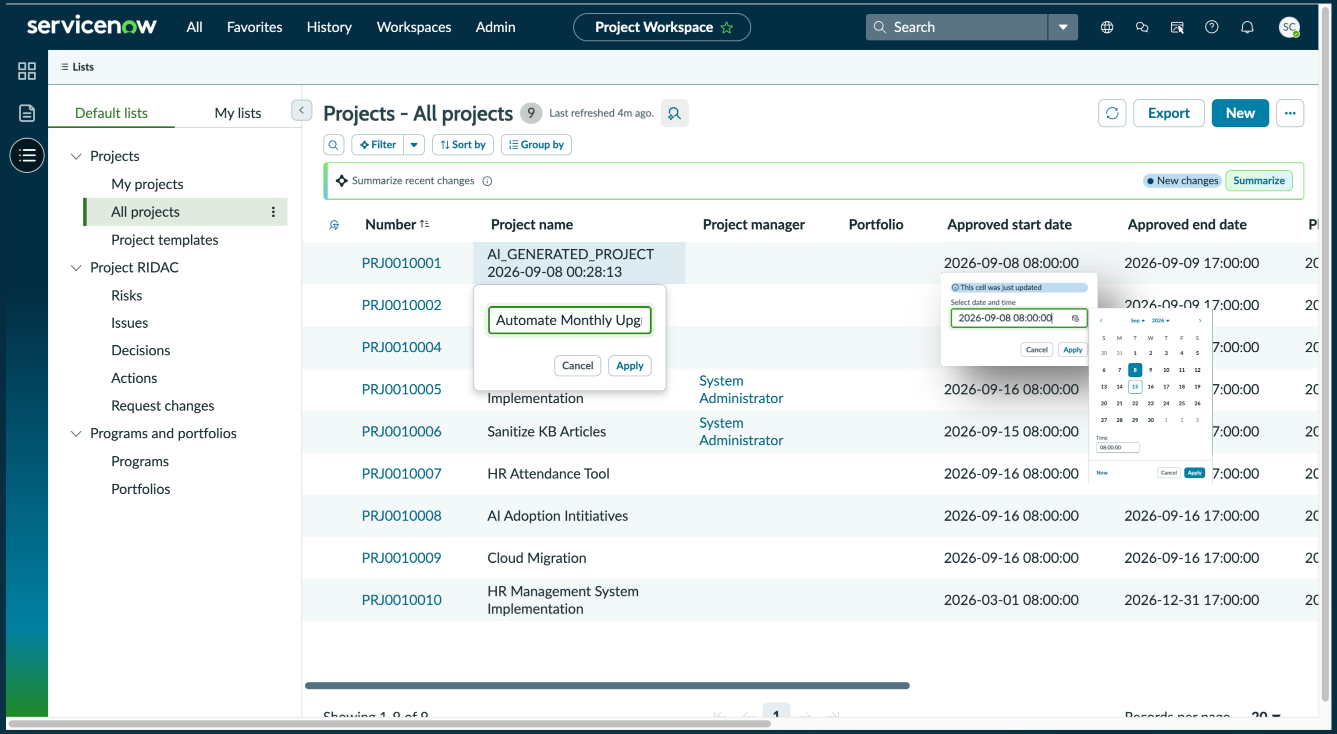
- Review how uploaded content maps to the project structure before any record is created, so project managers can verify the interpretation is correct before committing
- Adjust scope and correct gaps at the review stage rather than after the project has been generated, reducing rework and re-creation of tasks
- Stay in control of the AI-generated output — the review stage ensures the plan reflects your intent, not just the system's interpretation of your documents

Dynamic Content in Docs



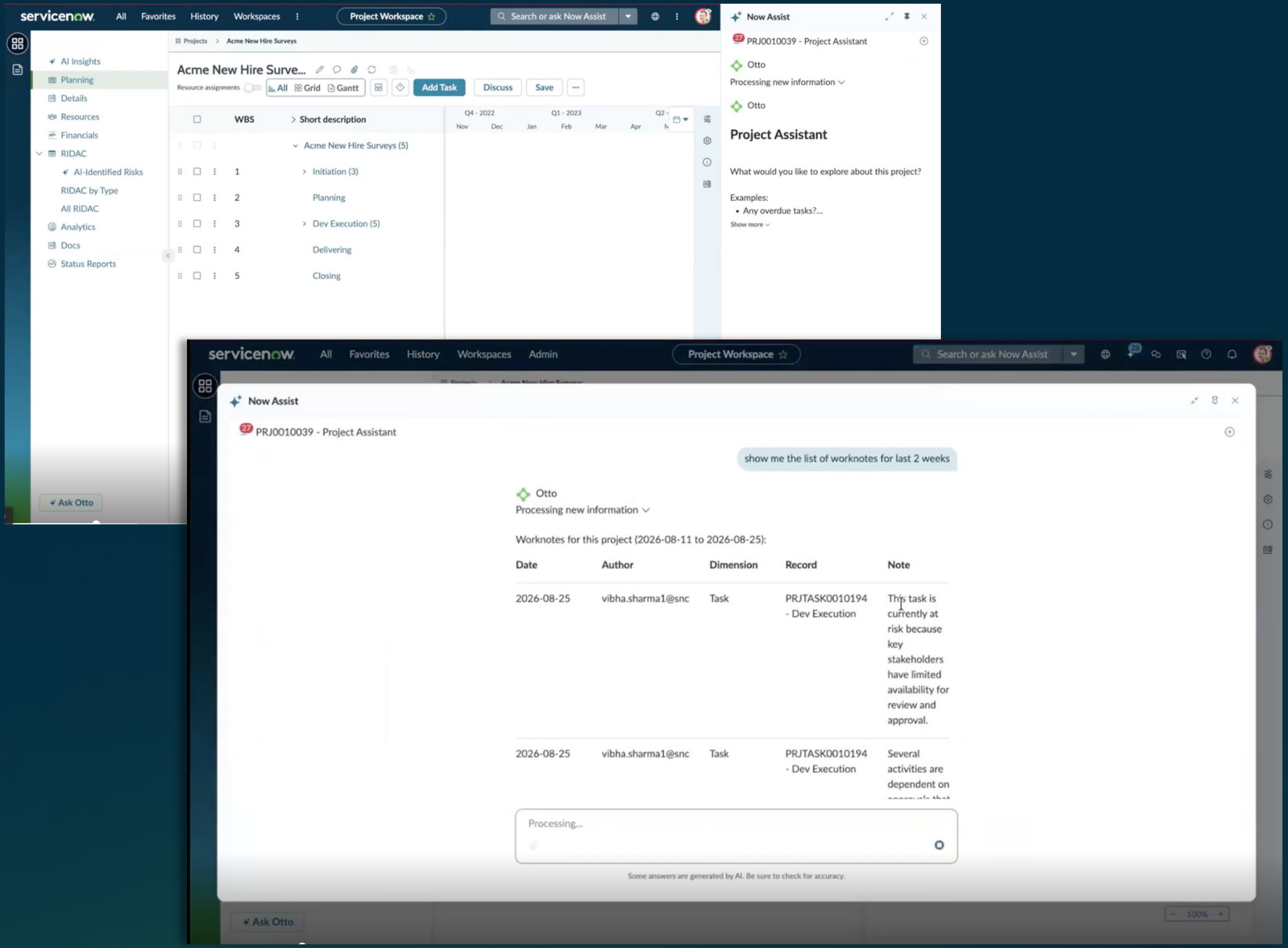
- Pull live project data, tables, and fields directly into project documents using a backslash trigger, so documentation stays connected to the actual project plan rather than becoming outdated the moment it is written
- Extend the same capability already available in status reports into project docs, giving teams a consistent way to embed real project data across any document they create in the workspace
- Eliminate manual copy-paste of project information into documents — dynamic content references the source directly, reducing the risk of stale or inconsistent data in project documentation

Edit Projects in List View



- Update project fields directly from the list view without navigating to the details page, saving the extra steps that added friction to routine edits
- Make quick changes to projects in sequence from a single view, rather than opening and closing individual records for each update
- Maintain list view context while editing — project managers stay oriented within their full portfolio view rather than losing context by navigating away to a details page

Project Q&A with ServiceNow Otto



- Bug fixes and accuracy improvements applied to the Ask Otto conversational panel based on customer and internal stakeholder feedback received after the initial release.
- Work notes from tasks, resources, and RIDAC are able better query through the same panel with date filters — currently returning a list of relevant work notes, with summarization planned as a follow-on enhancement.
- Ask Otto delivers more reliable responses based on direct feedback from early adopters. Project managers can now query work notes across tasks, resources, and RIDAC with date filters directly from the conversational panel, without navigating to individual records.

Project Workspace Enhancements

Fact Sheet

Why we added it

Project managers were losing time correcting inaccurate AI-generated plans, manually re-entering milestones from source documents, and fixing plans after creation with no review opportunity. Separately, project documentation disconnected from live plan data the moment it was written, and routine edits required navigating away from the list view entirely.

How you activate it

- Project Workspace

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

AI model tuning and prompt refinement improve plan generation accuracy from uploaded documents. Milestone extraction added to the generation pipeline. A pre-creation review step lets users inspect content mapping before committing. Dynamic content in docs uses a backslash trigger to pull live project fields and tables. Inline editing enabled directly from list view.

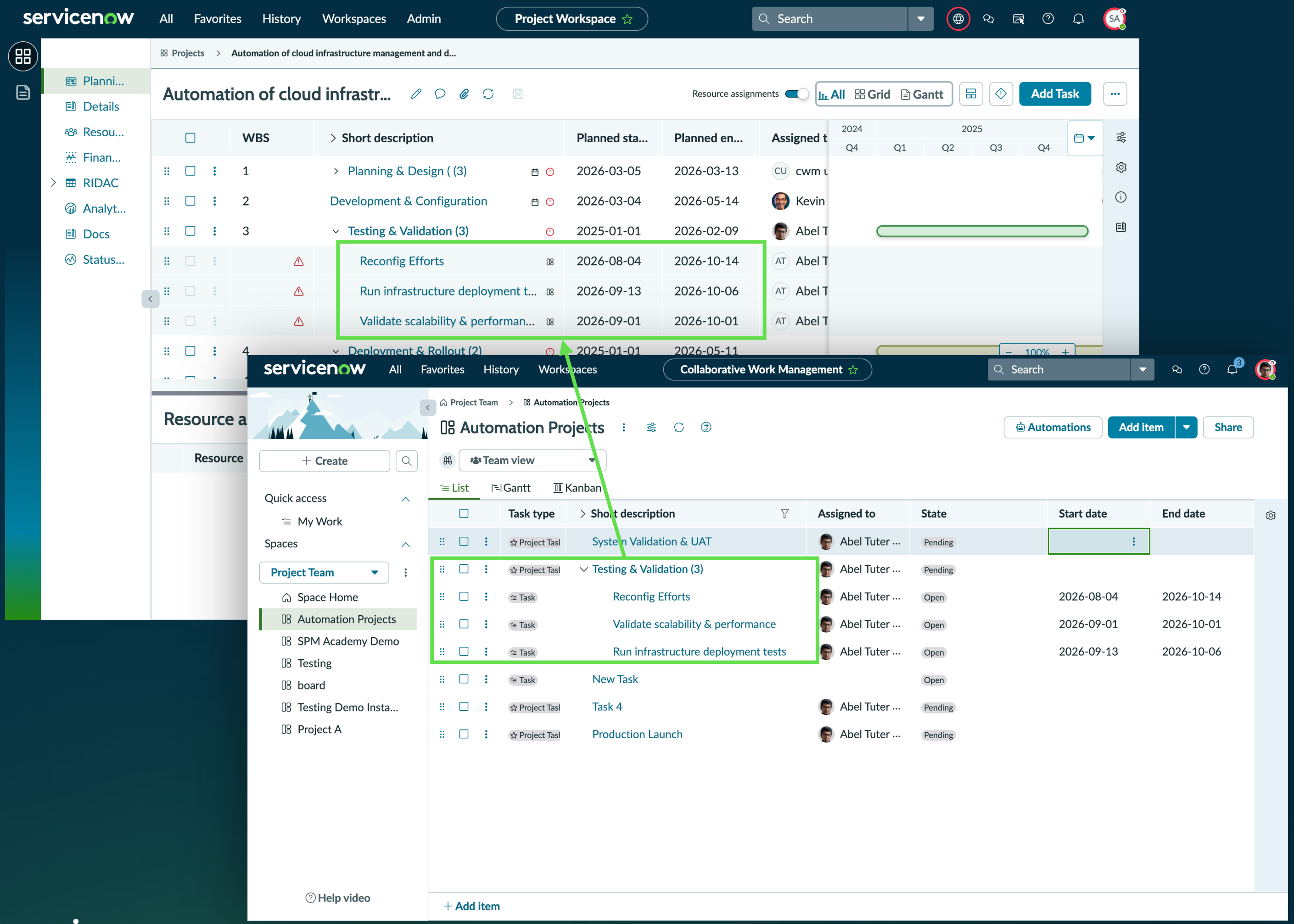
Before / After

Before: Inaccurate outputs required significant manual correction post-creation. Milestones lost during generation — re-entered manually. Projects created immediately with no inspection opportunity. Project Docs were Static — disconnected from plan data immediately after creation. Edits required navigating to the details page for each project

After: Project managers now receive more accurate AI-generated plans from uploaded documents with less post-creation rework. Milestones are automatically extracted from source documents and included in the plan. A pre-creation review step lets users inspect and adjust content mapping before committing. Project docs stay connected to live plan data through dynamic content, and routine edits can be made inline directly from the list view without losing portfolio context

Hybrid Project Management

Powered by ServiceNow Otto



Advanced and/or Prime

Spend less time setting up projects and more time running them

1. **Generate a structured project plan** from documents your team already has — Word, PDF, Excel, or PowerPoint — with phases, tasks, and milestones extracted automatically, so project managers are not starting from a blank slate.

2. **Review how uploaded content maps** to the project structure before anything is created, giving project managers control to adjust scope and correct any gaps before committing — reducing rework after the fact.

3. **Access project activity and work notes** from tasks, resources, and RIDAC directly through the Ask Auto conversational panel, with date filters, so project managers can surface what's happened across a project without manually hunting through records.

Hybrid Project Management. - PWS + CWM

PROJECT MANAGER
Project Workspace
Full governance & plan control

Phases & milestones
PM retains full ownership—never editable from CWM

Top-level tasks
Assign via resource assignee, assigned to, or assignment group

CWM-linked child tasks
Distinct icon + alert · read-only for PM · owned by CWM side

Sub-projects
Supported within this integration

Real-time sync
Status, dates & child tasks reflect back automatically

Assign →

Live Sync

← Updates

TEAM MEMBER
Collaborative Work Mgmt
Execution & day-to-day work

My Work view
Assigned project tasks appear here automatically

CWM board
Pull tasks in via Connected Work filter—by project or assignee

Child tasks & stories
Add, assign to colleagues, update start & end dates

Status & date updates
All changes sync back to Project Workspace in real time

Sub-project work
Nested project tasks also flow through the integration

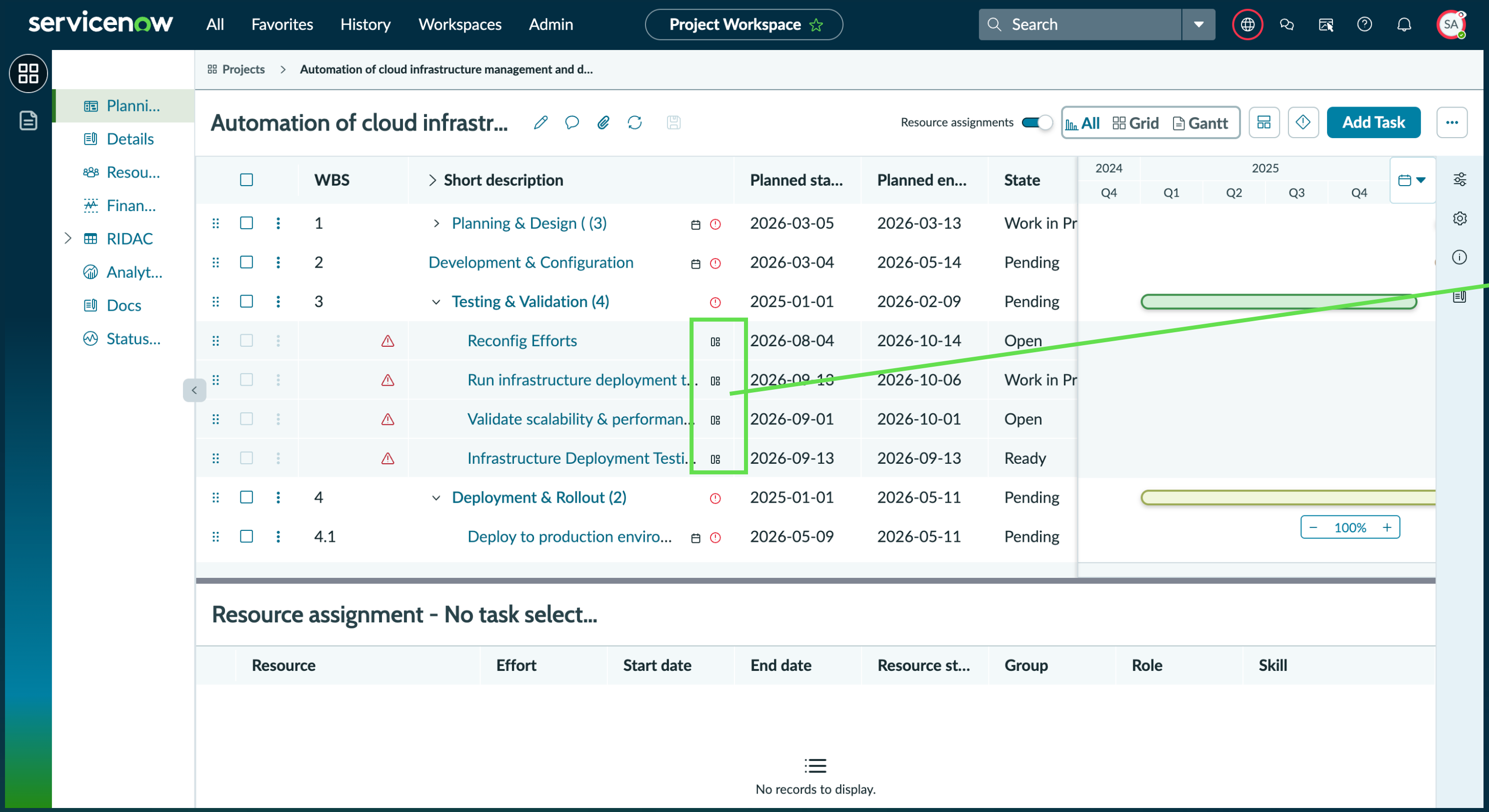
- Read-Only in PW
- Synced back to PW

Hybrid Project Management. - PWS + CWM

PROJECT MANAGER

Project Workspace

Full governance & plan control



- ✓ View CWM tasks associated to the project without navigating and creating separate integrations – providing full governance
- ✓ Identify tasks rolled-up from CWM with Board icon
- ✓ Status synced directly into Project Workspace
- ✓ Alert icon notifying that the tasks are read-only

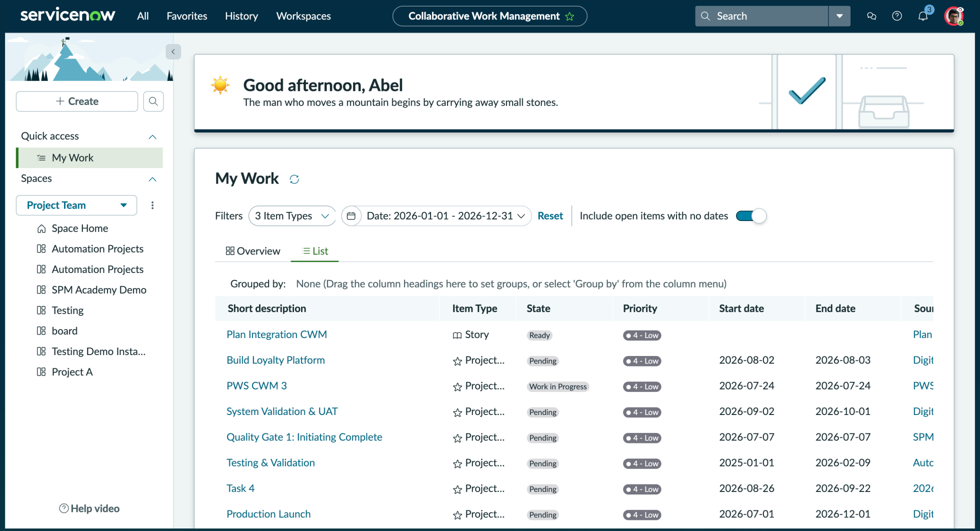
Hybrid Project Management. - PWS + CWM

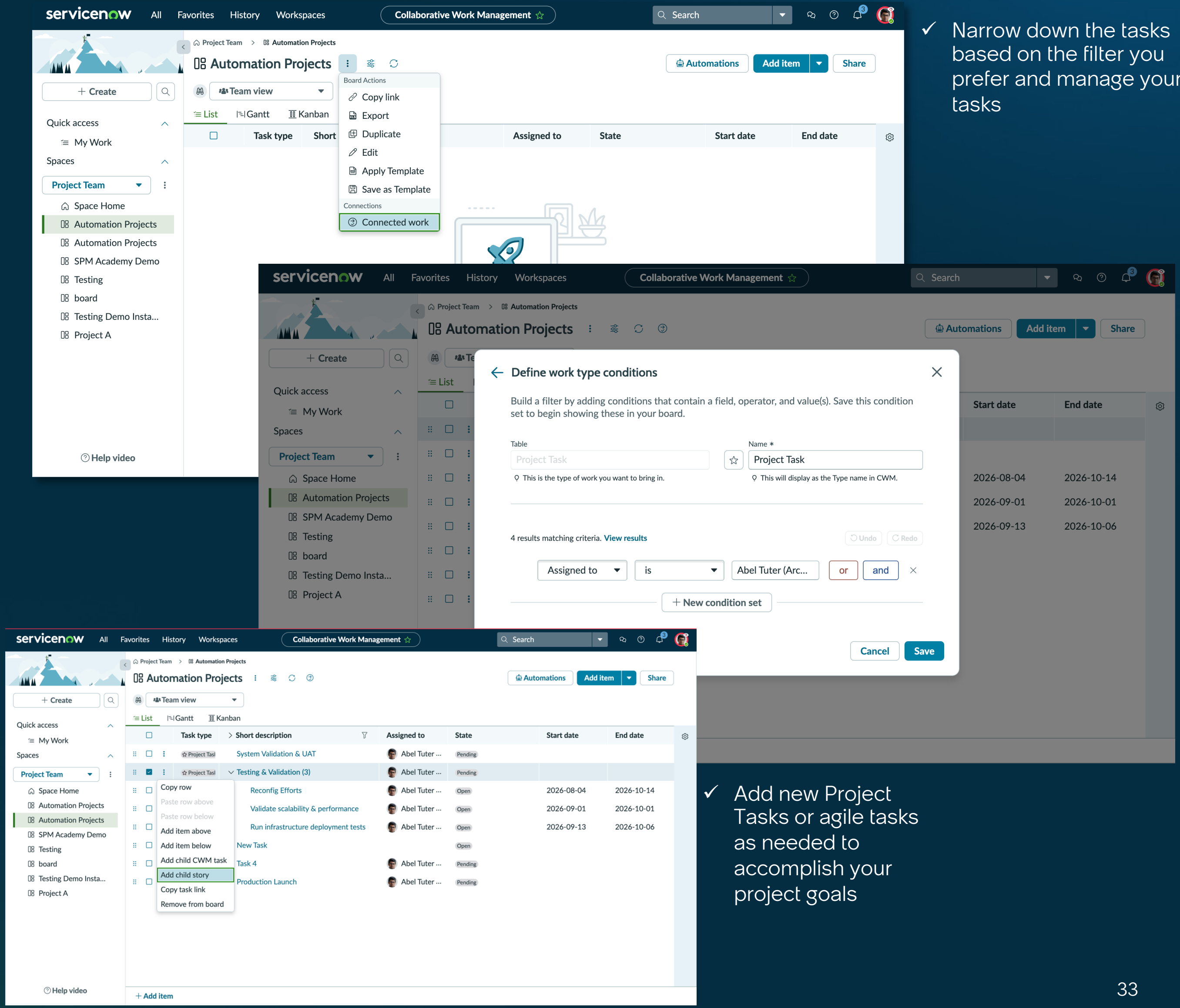
TEAM MEMBER

Collaborative Work Mgmt

Execution & day-to-day work

✓ Quickly view your assigned project tasks in My Work without any integrations





✓ Narrow down the tasks based on the filter you prefer and manage your tasks

✓ Add new Project Tasks or agile tasks as needed to accomplish your project goals

Hybrid Project Management – PWS + CWM

Brazil

Fact Sheet

Why we added it

Project managers and team members were working in separate tools with no synchronization — project managers had no real-time visibility into team activity without manually chasing updates.

How you activate it

- Project Workspace
- Collaborative Work Management

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

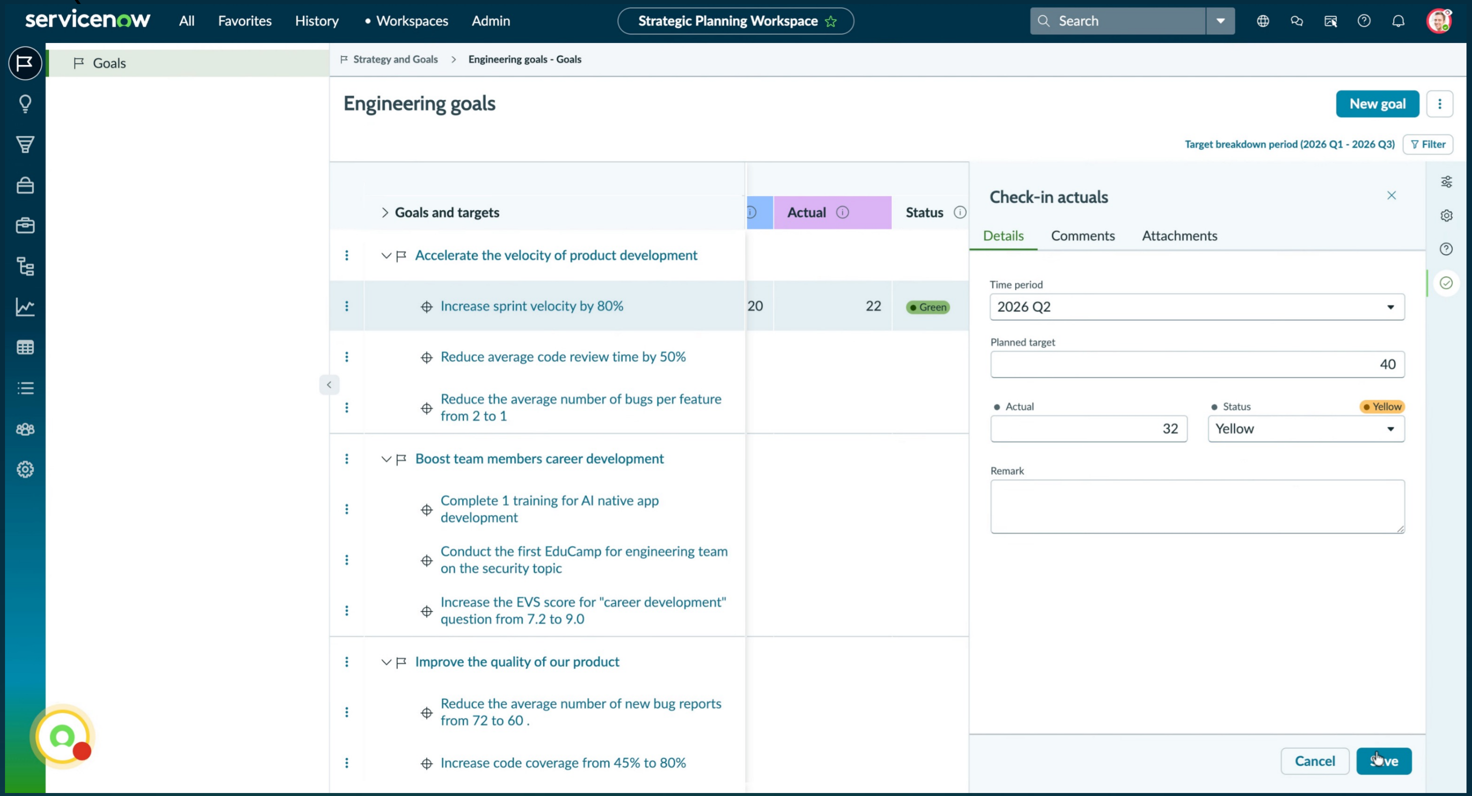
Project managers assign resources in Project Workspace. Assigned tasks appear automatically in the team member's CWM My Work view and can be pulled onto boards via the Connected Work filter. Team members add child tasks and stories, update status and dates in CWM, and all changes reflect back into Project Workspace in real time. CWM-linked tasks display with a distinct icon in Project Workspace — project managers retain governance over the parent plan but cannot edit CWM-side tasks.

Before / After

Before: Project managers and team members worked in separate environments with no synchronization. Project managers had no visibility into team-level activity unless they manually followed up, and team members had no way to see their project-assigned work inside CWM.

After: Project managers assign work in Project Workspace and receive real-time updates from CWM without any manual follow-up. Team members see their assigned project work directly in CWM, break it down into tasks and stories, assign across their team, and update status — all of which reflects back into the project plan automatically. Both personas stay in their preferred environment while working from a single synchronized view of project progress.

Automatic Target Status Calculation



Prime

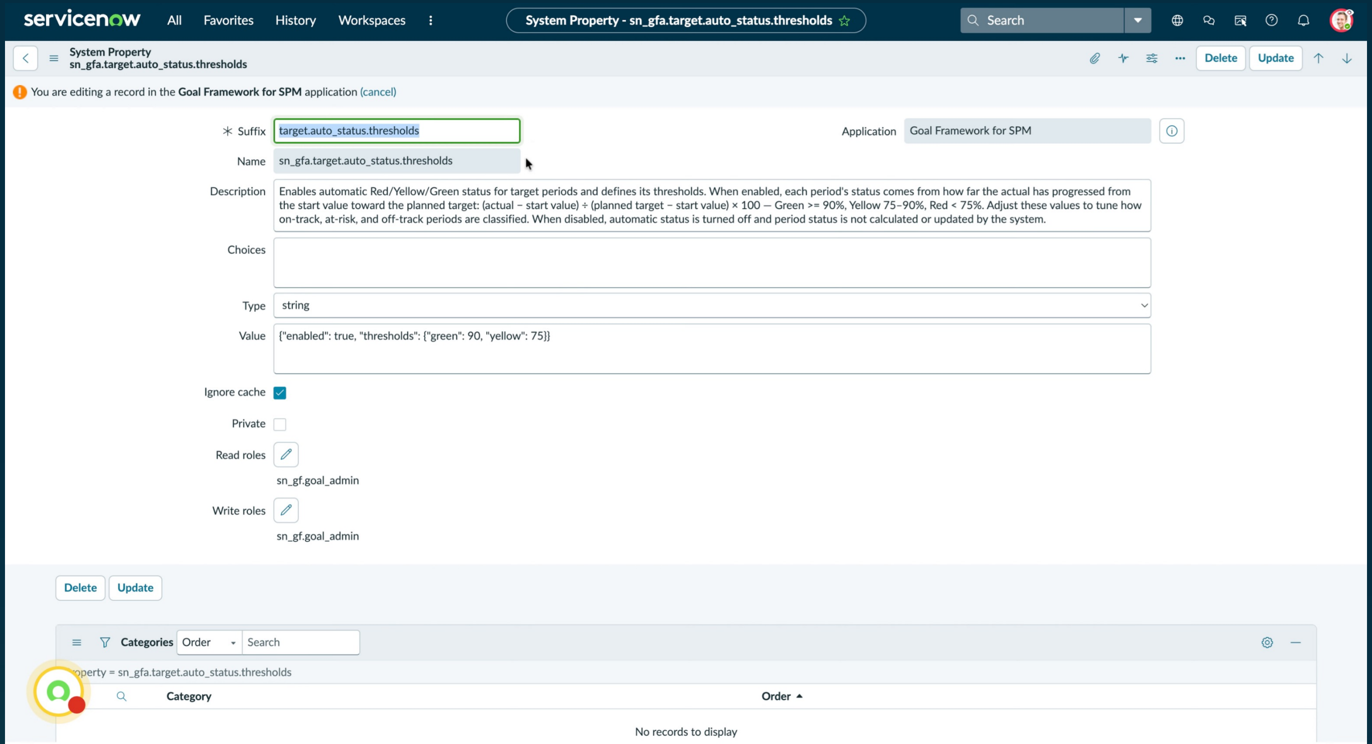
Target status that stays current without the extra step

1. Eliminate the manual step of selecting and saving a RAG status after every check-in — the system calculates and sets it automatically the moment actuals are entered, so target owners focus on the work, not the admin.

2. Ensure every check-in period has a populated status across all targets, giving leaders a consistent and trustworthy view of goal health without chasing incomplete records or second-guessing whether a Green status was actually entered or just never updated.

3. Set what Green, Yellow, and Red mean for your organization by configuring the threshold values that govern automatic calculation — so status reflects your performance standards, not a generic default.

Automatic Target Status Calculation



- A new system property (`sn_gfa_target_status_threshold`) governs automatic status calculation — enabled by default
- Status is calculated as percentage achievement of actual against planned target for each check-in period using the following default thresholds:
  - 90% or above → Green
  - 75–89% → Yellow
  - Below 75% → Red
- Status is set automatically the moment the target owner clicks outside the actuals field — no save action required
- Threshold values are configurable by admins — organizations can adjust the Green / Yellow / Red ranges to match their own performance standards
- The feature can be disabled entirely via the system property, reverting to manual status entry for organizations that prefer that approach
- Target owners retain the ability to override the automatically calculated status — the system sets a default, not a lock
- Applies consistently across all check-in periods for a target, ensuring every period has a populated status

Automatic Target Status Calculation

Fact Sheet

Brazil

Why we added it

Target owners were required to manually select and save a RAG status every time they checked in actuals — a step that was easy to skip, inconsistently applied, and added friction to an already repetitive task. When status fields were left blank or incorrectly set, it created data quality gaps across the organization's goal reporting. Leaders reviewing goal health could not trust that a Green status reflected actual performance — it might simply mean no one had updated it. This also placed an unnecessary burden on target owners to interpret their own numbers and translate them into a status, rather than just recording what happened.

How you activate it

- Strategic Planning
- Goal Framework for SPM

Licensing

SPM Prime

Who to target

Portfolio Managers

Technical

- Status is automatically calculated when actuals are entered, using configurable Green / Yellow / Red thresholds — no manual selection needed
- Admins can adjust the threshold ranges to match their organization's performance standards, or disable the feature entirely
- Target owners can override the auto-calculated status at any time, keeping teams in control of the final value

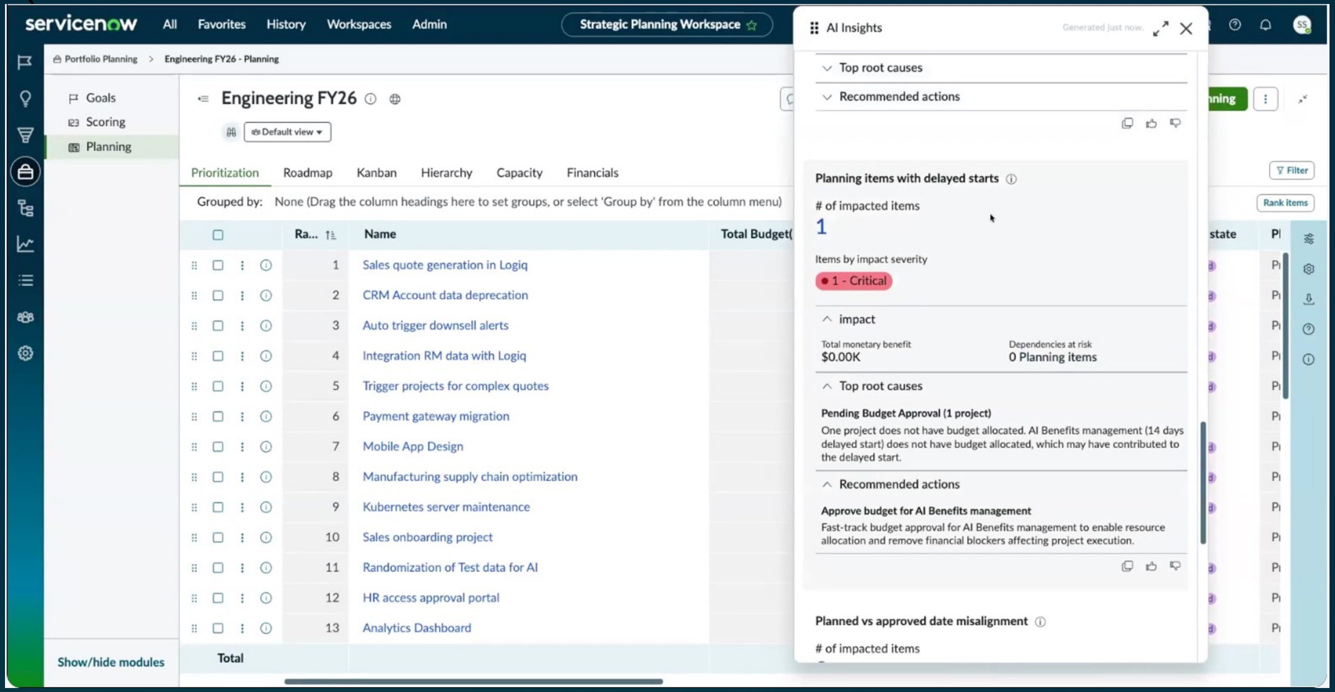
Before / After

Before: Target owners manually selected and saved a RAG status after every check-in. No configurable standard — each person interpreted their own numbers

After: Status is automatically set as soon as actuals are entered — no additional step required. Automatic calculation is the default; target owners can still override when context requires it

Portfolio AI Insights

Powered by ServiceNow Otto



$ Advanced and/or Prime

Surface portfolio risks earlier, understand why they're happening, and act before they escalate

1. Monitor your entire portfolio for schedule, financial, and resource risks in one AI-powered panel — without manually reviewing each planning item or waiting for project managers to surface issues

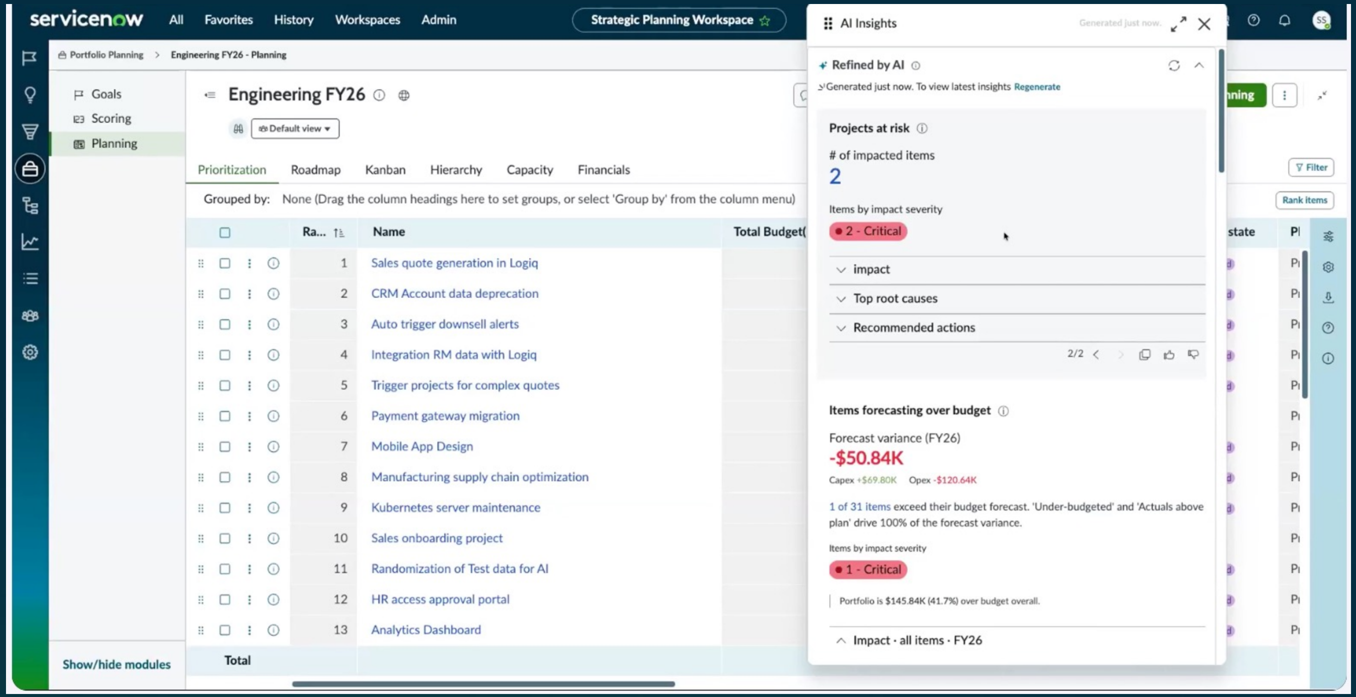
2. Understand the root cause behind every flagged item — whether it's delayed milestones, over-allocated resources, or labor and cost plan variances — so decisions are grounded in data, not assumptions

3. Access AI-generated recommendations alongside each insight, giving portfolio managers a starting point for action rather than having to determine next steps independently

4. Stay current by regenerating insights on demand to reflect the latest project data, with an expandable panel view and a per-insight info icon that explains exactly what data each insight is analyzing.

Portfolio AI Insights - Projects at Risk

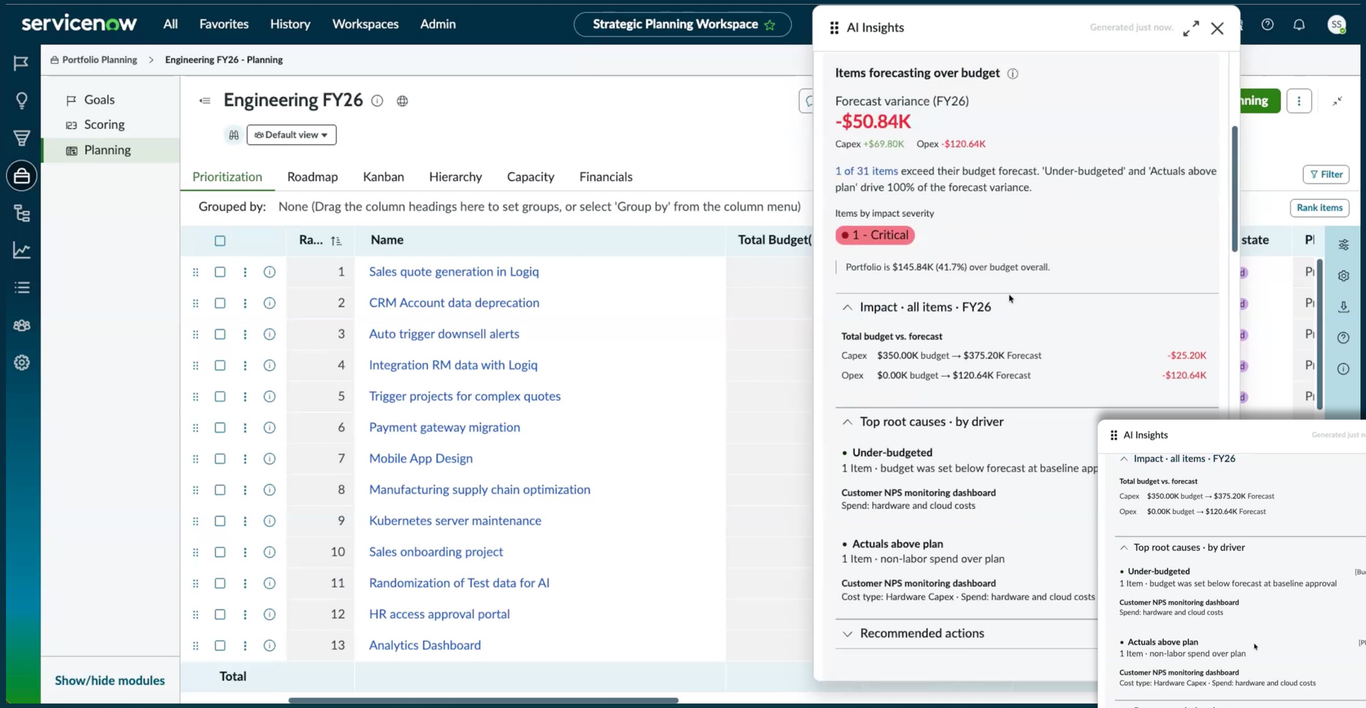
Powered by ServiceNow Otto

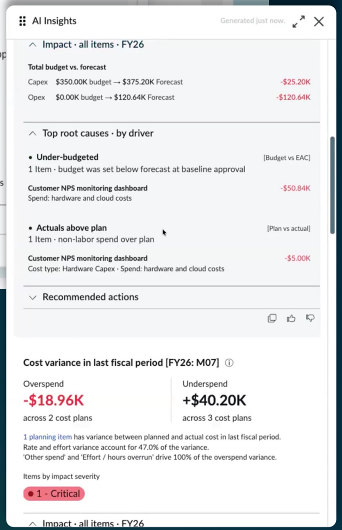


- Surface projects with underlying issues — delayed tasks, milestone dependencies at risk, and over-allocated resources — before those issues cause visible delays in the plan
- See the full impact of each at-risk project, including monetary benefit at stake and downstream dependencies that could be affected
- Act early using AI-generated recommended actions based on identified root causes, giving portfolio managers a concrete starting point for intervention

Portfolio AI Insights - Items Forecasting Over Budget

Powered by ServiceNow Otto





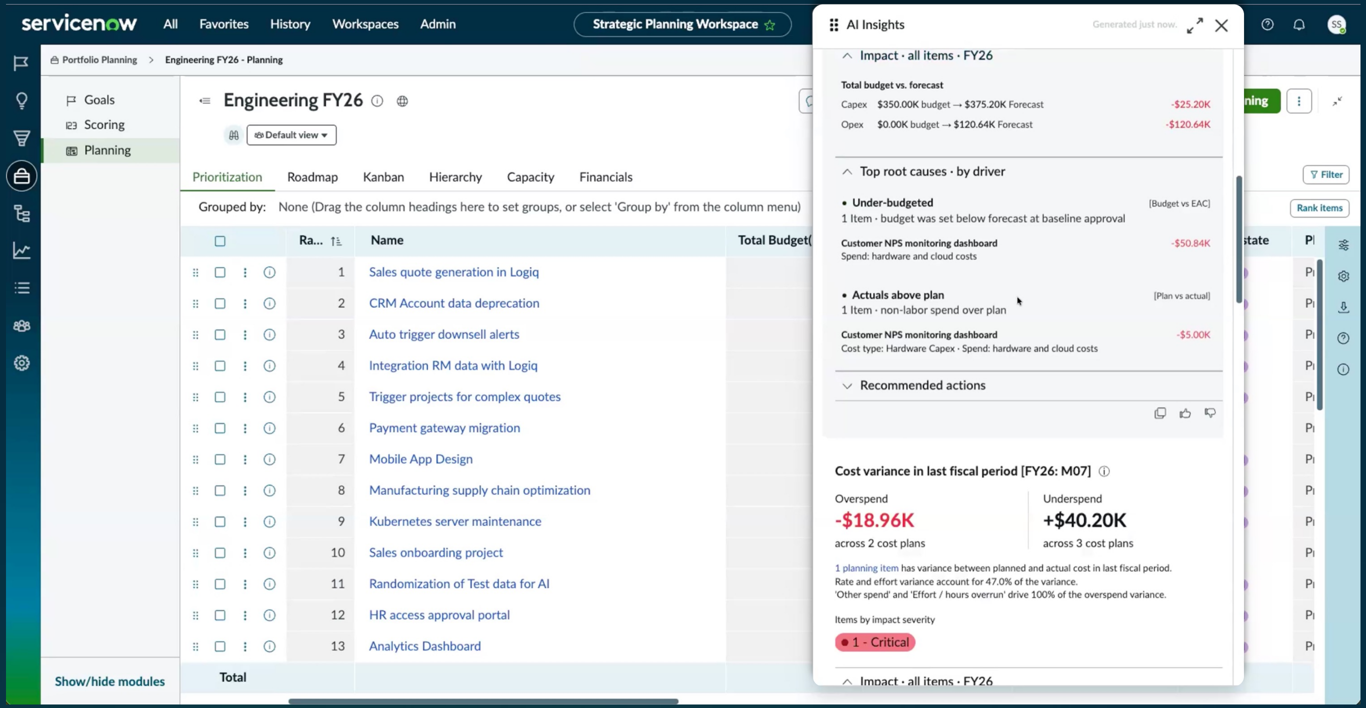
- Identify planning items where the forecast is exceeding the approved budget, with AI analysis that examines labor effort, resource rates, currency rates, and non-labor cost plan patterns as root causes

- Pinpoint the specific cost plan drivers behind each variance — whether it's higher-than-estimated labor hours, rate increases, or non-labor spend categories like hardware or CapEx

  Reduce the time spent manually reviewing cost plans by letting AI identify patterns and commonalities across multiple items, surfacing the most significant drivers in one view

Portfolio AI Insights - Enhanced AI Insights Panel

Powered by ServiceNow Otto



- Expand the insights panel to a full view for deeper analysis, without losing context of the portfolio plan underneath
- Regenerate insights on demand to reflect the latest updates across your planning items — no need to wait for a scheduled refresh
- Understand what each insight is analyzing through a per-insight info icon that explains the methodology, data considered, and how impact and root causes are determined
- See the most critical insights first with reordered priority — Projects at Risk surfaces at the top so portfolio managers focus attention where it matters most

Portfolio AI Insights

Fact Sheet

Why we added it

Portfolio managers had no proactive signal for projects heading toward risk or budget overruns until issues were already visible in the schedule or financials. Budget-related issues were the top customer ask from PAC sessions and remained unaddressed after the initial schedule-focused insights in Q2.

How you activate it

- Strategic Planning (*SPM Prime Licensing*)

Licensing

SPM Prime

Who to target

Portfolio Managers
Demand Managers

Technical

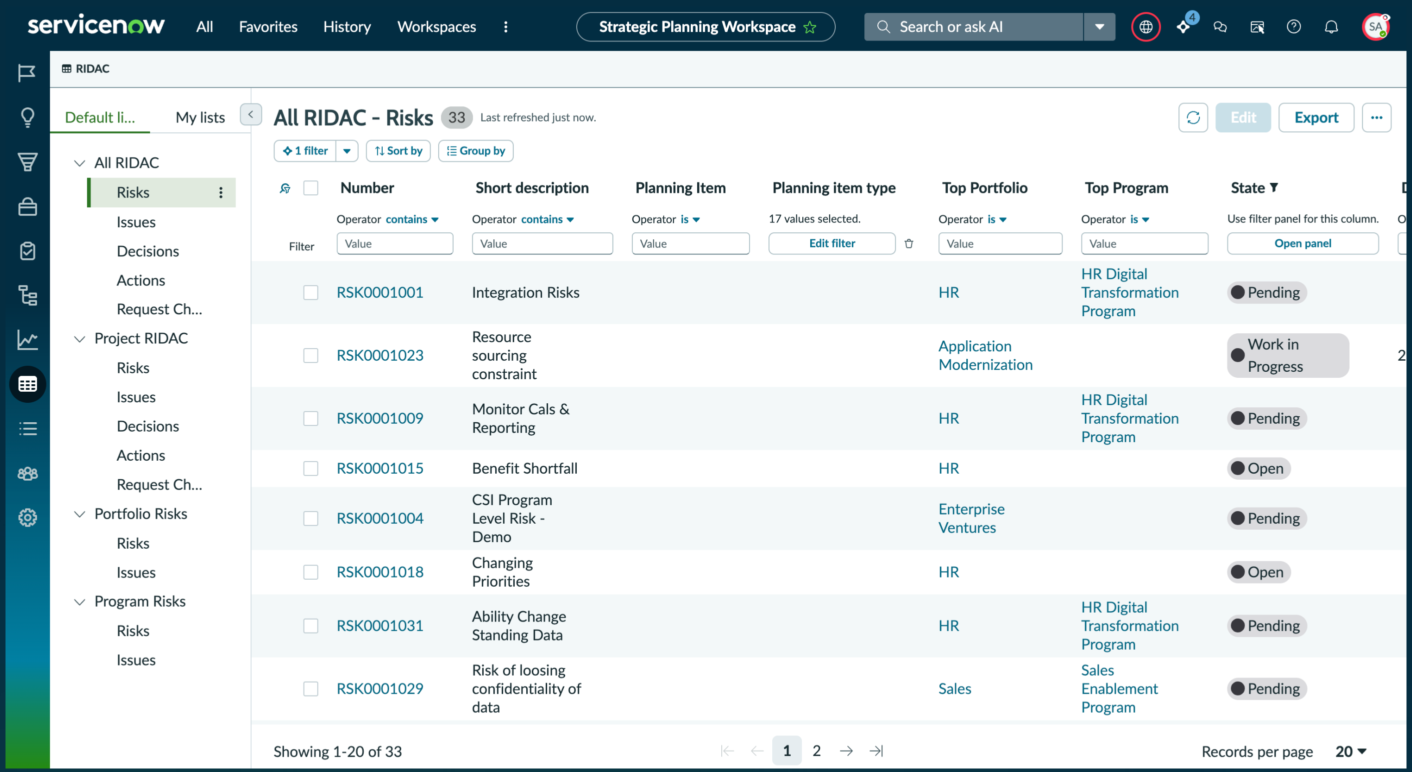
Three new insights added to the AI Insights panel in Strategic Planning Workspace: Projects at Risk surfaces underlying schedule, resource, and financial pressures before delays occur; Items Forecasting Over Budget identifies cost plan variances across labor, rates, and non-labor categories; Actuals Over Budget flags where spend has already exceeded approved budget. Panel enhanced with expandable full view, on-demand regeneration, per-insight info icon, and priority-based reordering.

Before / After

Before: The AI Insights panel contained three schedule-focused insights only. Portfolio managers had no AI-assisted view of financial risk, and the panel offered no way to expand, regenerate, or understand the methodology behind each insight.

After: Portfolio managers can monitor schedule, financial, and resource risk across their portfolio from a single expanded AI Insights panel, with root cause analysis, recommended actions, and full transparency into how each insight is generated — refreshable on demand as project data changes.

RIDAC



$ Advanced and/or Prime

Manage risks, issues, decisions, and actions in one consistent, editable experience across your entire portfolio

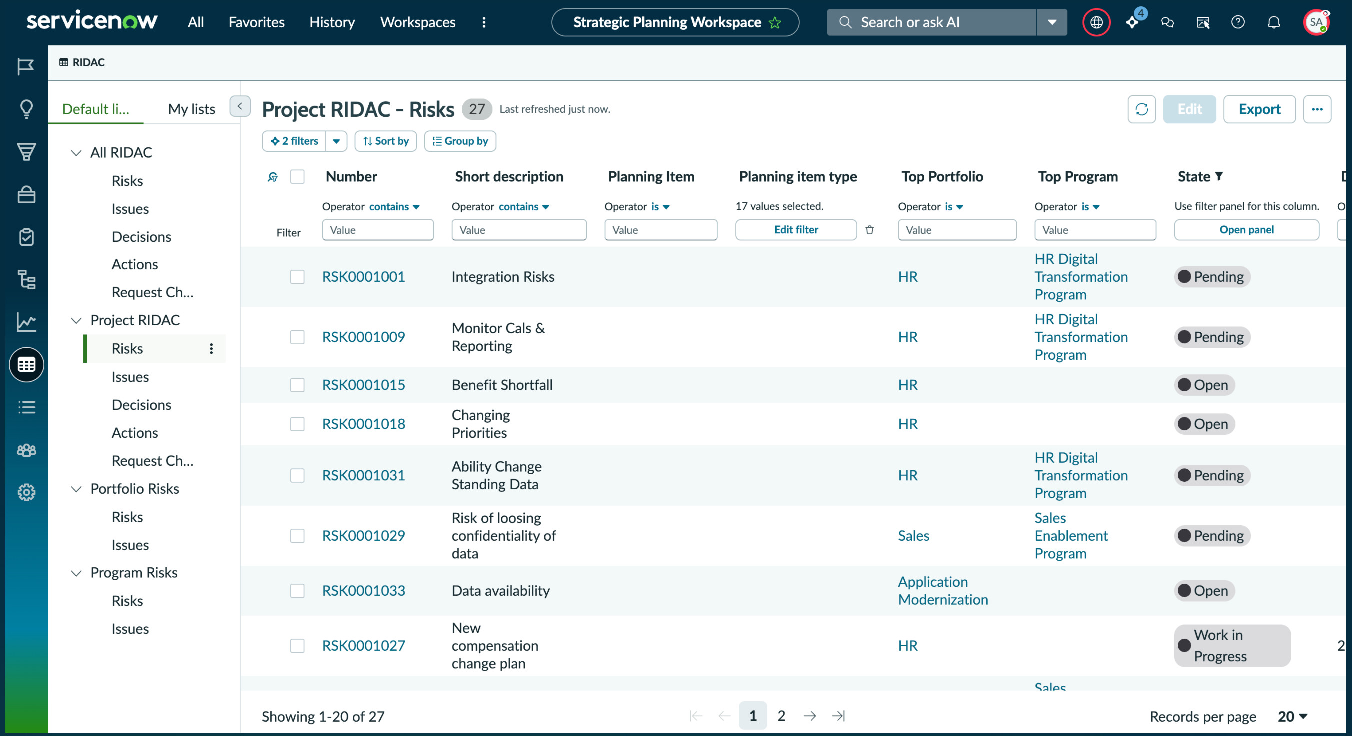
1. Access all RIDAC items — risks, issues, decisions, actions, and change requests — through a single, consistent navigation experience with separate tabs per type, replacing a grid layout that required individual record navigation

2. Edit inline and action multiple records at once across any RIDAC type, removing the friction of opening individual records to make routine updates

3. Understand exactly how AI identifies risks through a new info icon on the AI Identified Risks skill, and trust that manually created risks are kept cleanly separate from AI-generated ones

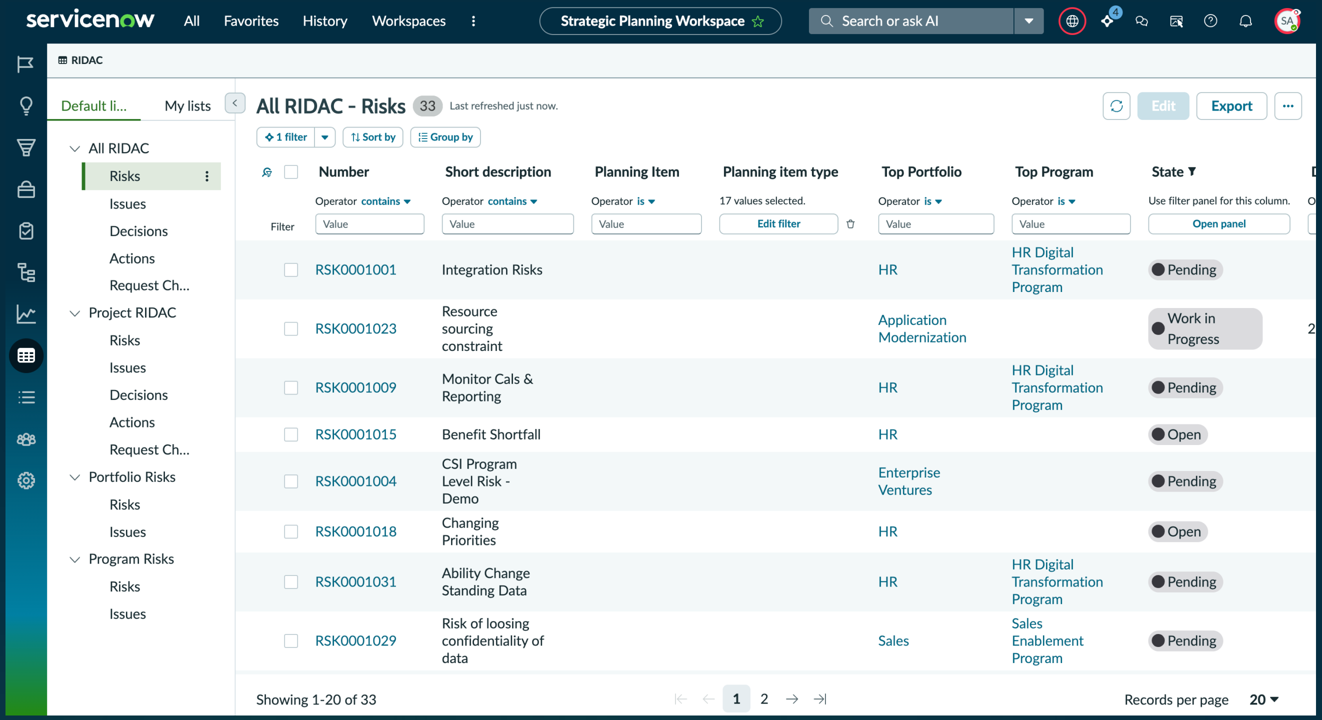
4. Track RIDAC across the full delivery lifecycle — the related list is now extended to demands, epics, features, and iterations, so risks and issues are visible wherever work is being managed

RIDAC by Type



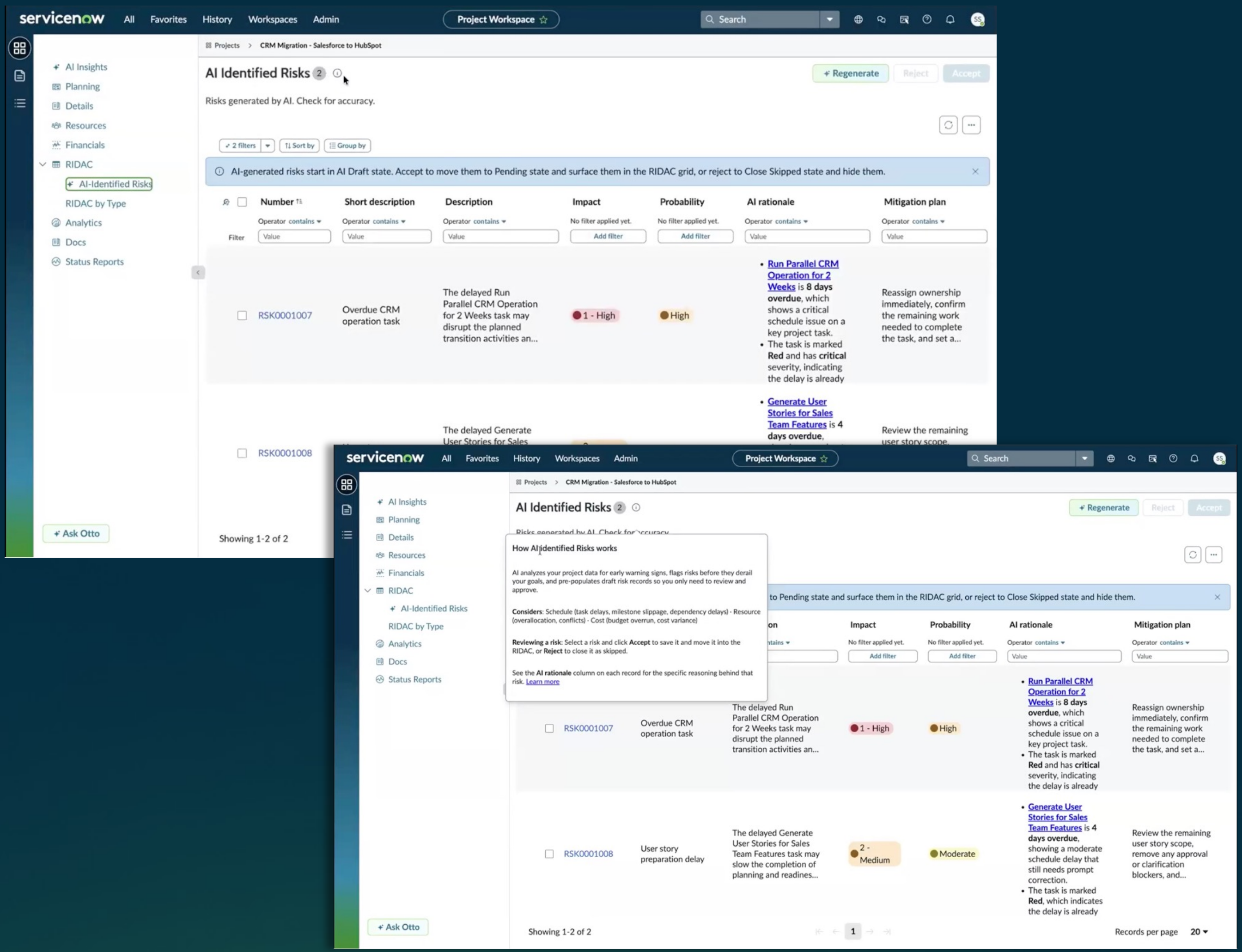
- Navigate RIDAC by type — risks, issues, decisions, actions, and change requests each have their own tab, making it faster to find and work within a specific category without filtering a combined grid
- Edit records inline and perform actions across multiple rows at once, capabilities that were not available in the previous grid layout
- Retain all existing RIDAC functionality within the new experience — existing customers will see both views during transition, while new customers move directly into the updated navigation

RIDAC as Related List



- Track risks, issues, decisions, and actions directly on demands, epics, features, and iterations — the same related list experience already available on projects is now extended across the full delivery hierarchy
- Reduce context switching for teams managing agile and hybrid delivery by surfacing RIDAC items on the records where work is actually happening, rather than requiring navigation to a separate view
- Maintain a consistent risk and issue management practice across waterfall and agile delivery without requiring teams to manage separate tracking processes

AI Identified Risks



- An info icon added directly to the AI Identified Risks skill page explains the skill methodology, what data is being considered, how risks are flagged, and links to the supporting community article.
- A bug fix ensures manually created risks no longer inherit the AI Draft state, which is reserved exclusively for AI-generated risks. Accepted AI risk hyperlinks now redirect to RIDAC by Type rather than the legacy All RIDAC grid view.
- Users can understand the AI risk identification methodology directly on the page without leaving the application. Manually created risks are cleanly separated from AI-generated ones, and accepted risk links route directly into the updated RIDAC by Type experience.

RIDAC

Fact Sheet

Why we added it

Managing risks, issues, decisions, and actions across a portfolio required navigating a combined grid with no type-level separation, and RIDAC visibility was limited to projects — leaving agile and hybrid delivery teams without a consistent way to track risks on their work.

How you activate it

- Strategic Planning (*SPM Adv Licensing*)

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Demand Managers

Technical

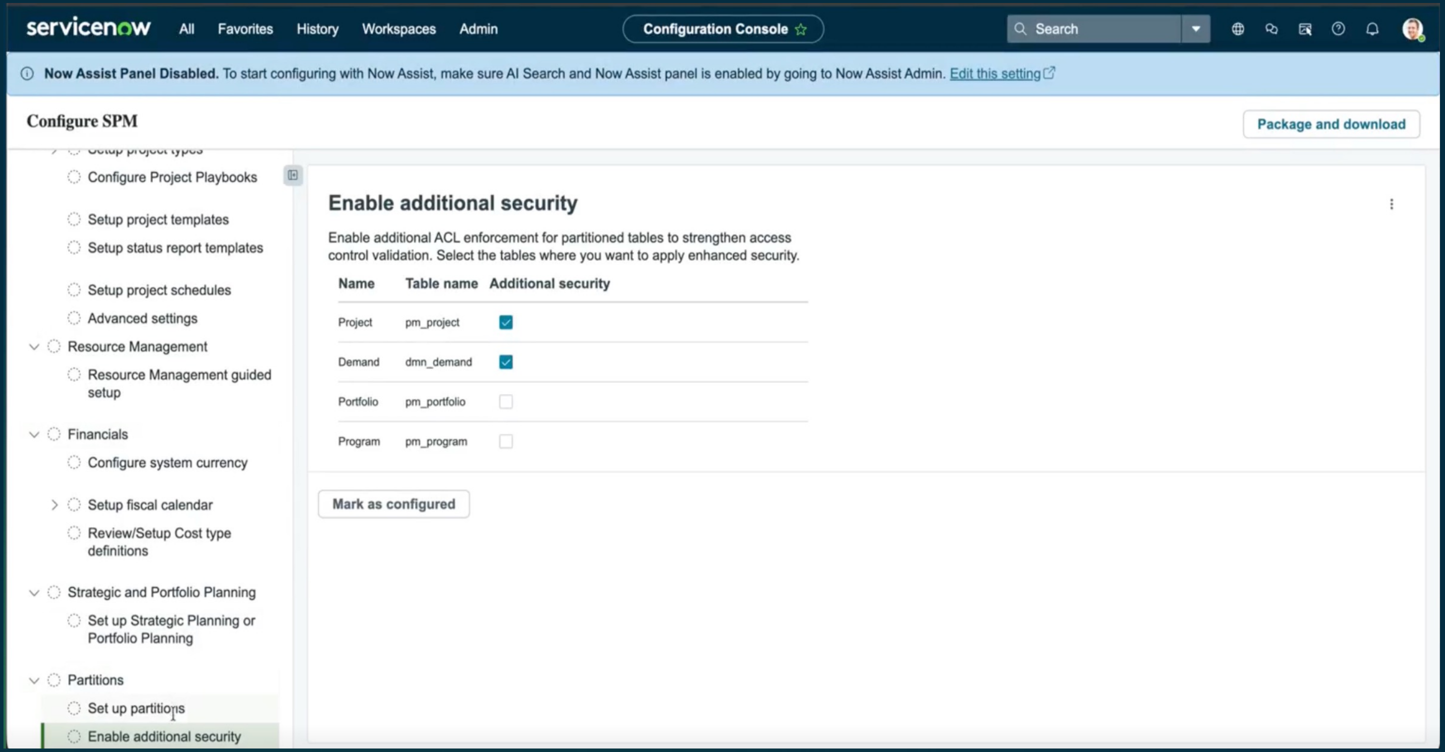
RIDAC navigation restructured into separate tabs per type — risks, issues, decisions, actions, change requests — with inline editing and multi-row actions. Data model extended to support RIDAC on goals and EAP iterations. RIDAC added as a related list on demands, epics, features, and iterations. RIDAC also available as a filtered list within portfolio plans.

Before / After

Before: All RIDAC types were managed in a single combined grid with no type-level separation, no inline editing, and no visibility on agile delivery entities such as epics, features, and iterations.

After: RIDAC is accessible by type across a consistent tabbed experience with inline editing, available as a related list across the full delivery hierarchy, and visible within portfolio plans — giving project, agile, and portfolio teams a unified approach to risk and issue management.

Enterprise-Wide Deployment — Security



$ Advanced and/or Prime

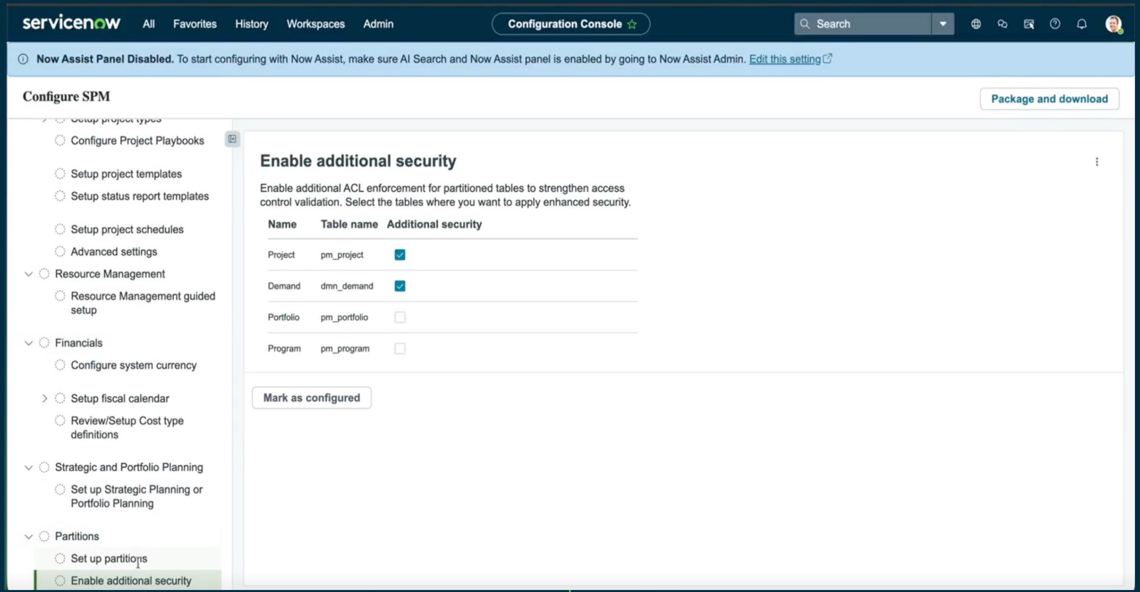
Stronger, more configurable security controls for organizations running SPM at enterprise scale

1. **Add a second layer of security** to partition-based deployments through ACLs, giving organizations granular control over who can access data within each partition — beyond what role-based access alone provides

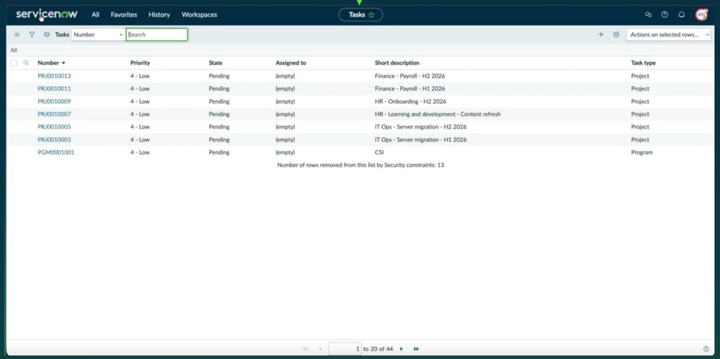
2. **Control whether system administrators can access partition data** by default — admin access is now off unless explicitly granted through partition roles, addressing a key concern raised during early customer testing

3. **Deploy with greater confidence** in multi-partition environments, knowing that both access control and administrative data visibility are configurable to your organization's governance requirements

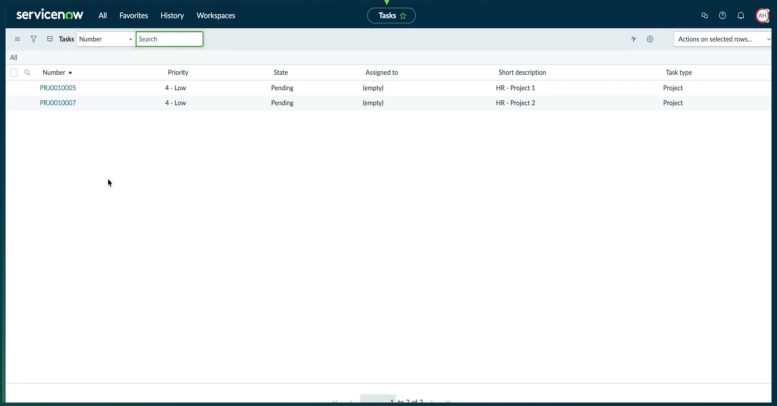
Extended Security for EWD Partitions



Without enabling ACLs, user could still access projects from `task.list` even though partitions disabled it earlier

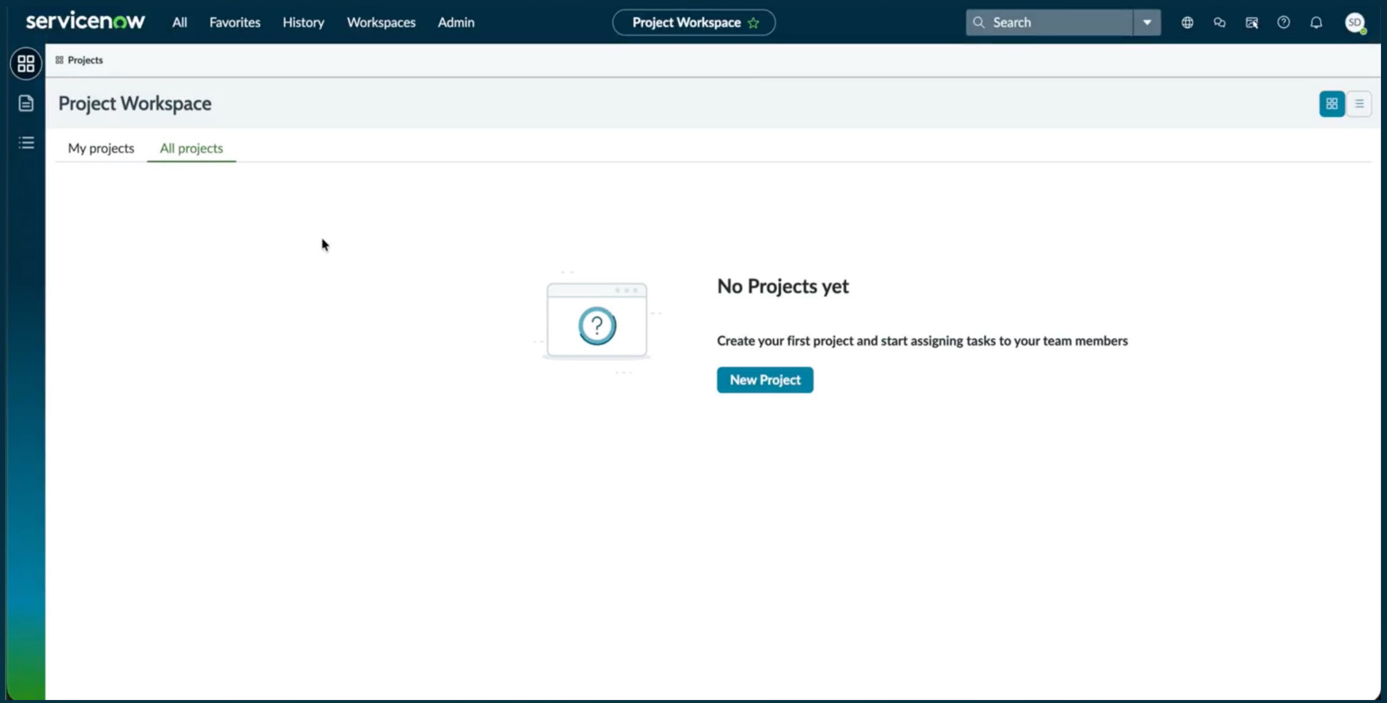


After enabling ACLs, user CANNOT access projects from `task.list`



- Apply a second layer of access control to EWD partitions through a new store application that introduces ACLs on top of existing partition role-based security
- Meet more stringent data separation requirements for organizations where partition boundaries must be enforced at the record level, not just at the application or role level
- Install selectively — the extended security application is available via the store, allowing organizations to adopt it based on their specific governance and compliance requirements

Admin Access Control for Partition Data



- Default to 'false' access for system administrators — partition data is no longer accessible to admins by default, requiring explicit assignment of partition roles before access is granted
- System property: sn_spm_ewd.allow_admin_access_to_all_partitions
- Address the governance gap identified by customers during early partition testing, where admin-level access to all partition data created an unintended data visibility risk
- Configure access boundaries clearly for each partition, giving organizations control over which administrators can see which partition's data — without relying on platform-wide admin privileges as a bypass

Enterprise-Wide Deployment — Security

Fact Sheet

Why we added it

Customers deploying SPM across large enterprises needed stricter data separation between partitions than role-based access alone could provide, and system admin visibility into partition data was broader than required by governance standards.

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

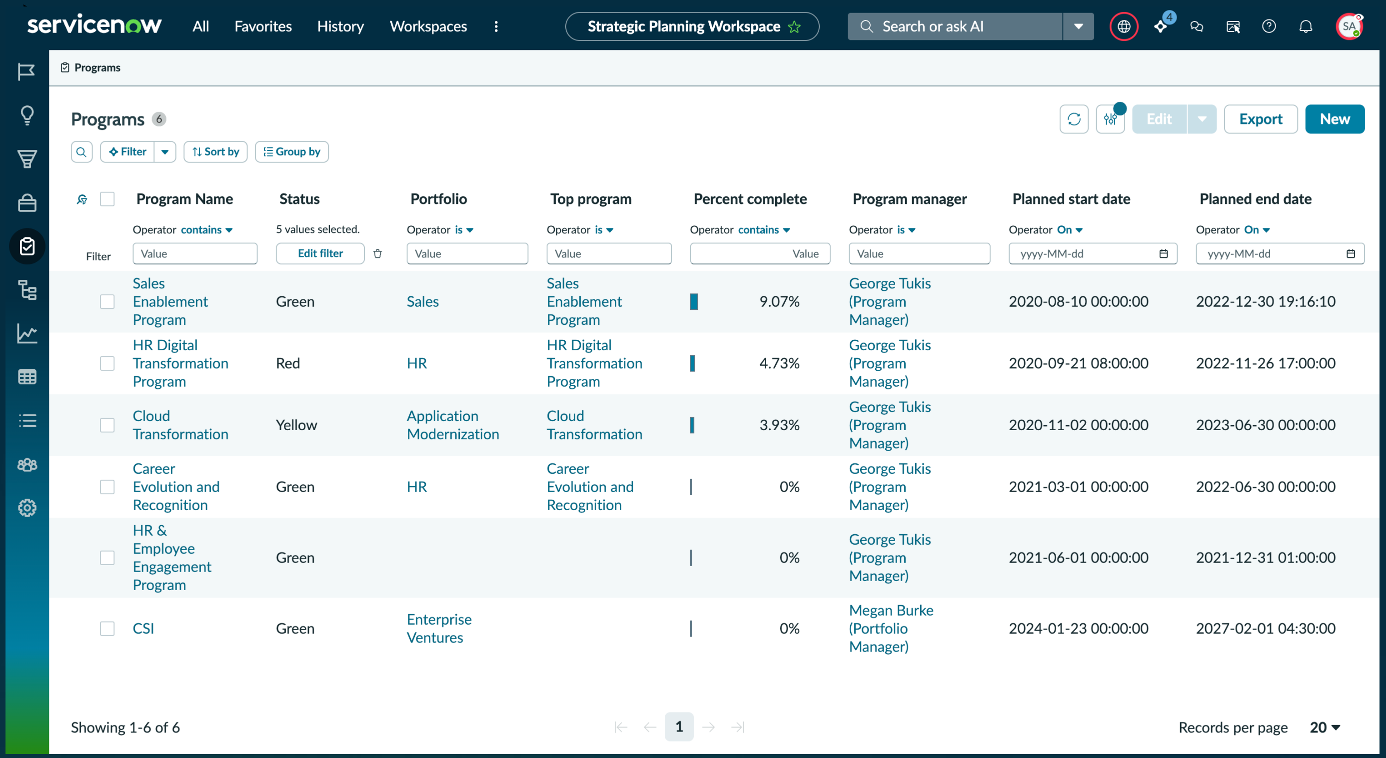
A new store application adds ACL-based security as a second layer on top of existing partition role assignments. System administrator access to partition data is now off by default, requiring explicit partition role assignment before access is granted.

Before / After

Before: Partition security relied solely on role-based access, with no record-level enforcement. System administrators had default visibility into all partition data regardless of whether that access was needed or authorized.

After: Organizations can enforce partition data boundaries at the record level through ACLs, and system administrators access only the partition data they are explicitly authorized for, supporting stricter governance requirements across enterprise deployments

Programs in SPW



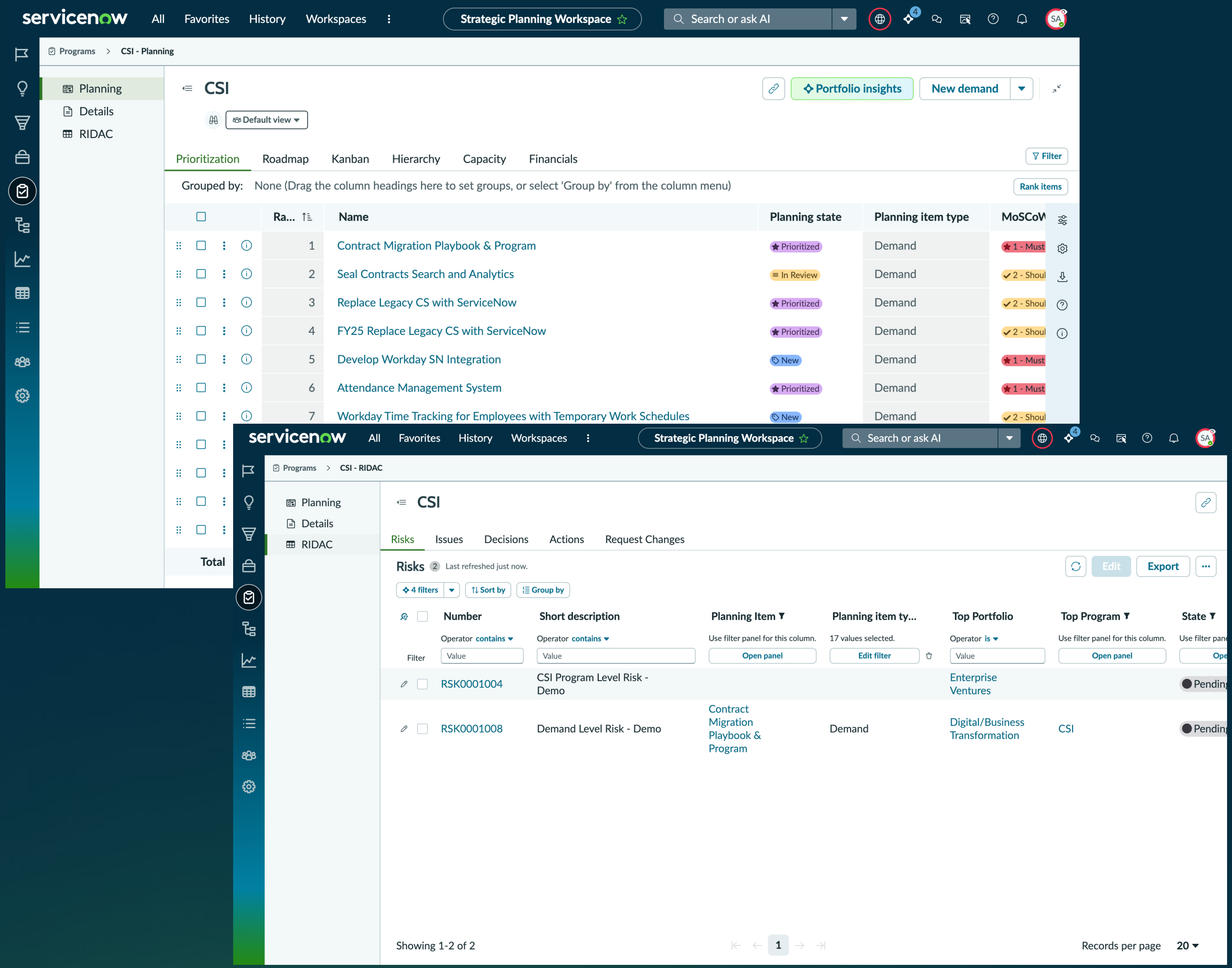
Program Name	Status	Portfolio	Top program	Percent complete	Program manager	Planned start date	Planned end date
Sales Enablement Program	Green	Sales	Sales Enablement Program	9.07%	George Tukis (Program Manager)	2020-08-10 00:00:00	2022-12-30 19:16:10
HR Digital Transformation Program	Red	HR	HR Digital Transformation Program	4.73%	George Tukis (Program Manager)	2020-09-21 08:00:00	2022-11-26 17:00:00
Cloud Transformation	Yellow	Application Modernization	Cloud Transformation	3.93%	George Tukis (Program Manager)	2020-11-02 00:00:00	2023-06-30 00:00:00
Career Evolution and Recognition	Green	HR	Career Evolution and Recognition	0%	George Tukis (Program Manager)	2021-03-01 00:00:00	2022-06-30 00:00:00
HR & Employee Engagement Program	Green			0%	George Tukis (Program Manager)	2021-06-01 00:00:00	2021-12-31 01:00:00
CSI	Green	Enterprise Ventures		0%	Megan Burke (Portfolio Manager)	2024-01-23 00:00:00	2027-02-01 04:30:00

$ Advanced and/or Prime

Bring your existing programs into Strategic Planning Workspace — without starting from scratch

1. Access all your existing legacy programs directly from a new L1 menu in Strategic Planning Workspace, without having to navigate away from the workspace or recreate program structures you already have
2. Start working in the modern portfolio planning experience immediately — the system automatically creates a portfolio plan for each of your programs, so teams are not faced with a manual setup process before they can begin using SPW functionality
3. Transition at your own pace — the Programs L1 gives existing program users a familiar entry point into SPW, making adoption incremental rather than requiring an all-at-once migration from legacy programs

Programs in SPW



- Access model — users who already have SPW and program access can view the auto-created portfolio plan without any additional setup or sharing step. Access is inherited from existing role assignments, not manually configured per plan

- RIDAC within the Program Plan — RIDAC items are available within the program plan as a filtered list, covering both the program-level entities and the planning items within it. Users can filter by project, portfolio, or program. Decisions, actions, and change requests are being added to programs specifically as part of this release

Programs in SPW

Fact Sheet

Why we added it

A large number of customers actively use legacy programs but had no pathway into Strategic Planning Workspace, creating a gap between where they worked and where the platform was heading.

How you activate it

- Strategic Planning
- Portfolio Planning

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Program Manager

Technical

A new Programs L1 option added to SPW automatically generates a portfolio plan for each existing legacy program. Access is governed by existing SPW and program roles — no additional setup required. Capacity, financials, and a program status report follow in October.

Before / After

Before: Legacy program users had no access to Strategic Planning Workspace functionality and no structured way to transition their existing programs into the modern planning experience.

After: Existing legacy programs are accessible directly from SPW with a portfolio plan automatically created for each, giving program users immediate access to modern planning functionality without manual setup or migration effort.