Communication & Adoption Guide

A Practical Approach
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Introduction

Effective and tailored communications contribute to the awareness and adoption of the ServiceNow solution. Though easy to use, the implementation of ServiceNow may result in significant changes to employees’ day-to-day jobs, from how they get their work done and to whom they make requests. Therefore, proper preparation will help with the transition and promote a positive experience.

This document includes good practices for communicating changes and ensuring proper training for those impacted. It is not inclusive of all project management communications related to the project team. However, it is intended as a guide for user communications regarding awareness and training purposes.

Champion Enablement

Templates associated with executing on the recommendations in this guide can be found in the ServiceNow Customer Success Center under Champion Enablement.

Champion Enablement includes guides and templates for the following topics:

- Communication and training
- Program management and strategy
- Introducing ServiceNow to your enterprise

If you have any questions about Champion Enablement, please contact your ServiceNow account team or email champion.enablement@servicenow.com.

Using Change Champions

Who is a Change Champion?

Change Champions are those within your organization that are positioned and willing to help with supporting change and are effective leaders within their respective spheres of influence. Typically, this will include:

- First line managers
- Team leads
- Executive Assistance
- Volunteers who excel in their roles and are respected by their peers

How do you identify Change Champions and get them involved?

Change Champions should be engaged early in the project and should not be an afterthought to drive excitement right before go-live. The early involvement will make them part of the overall success of the project, and not just a means to an end. This is also important when considering their role in the program management aspects of ongoing service improvement. First, engage with the Executive Sponsor, Service Owner, and Platform Owner to identify who should be on the list of Change Champions (see suggested roles above). If there aren’t enough employees with the roles listed above, or if volunteerism is part of your corporate culture, open up the search to volunteers. Drive buy-in and early involvement in the following ways:

- Hold a meeting to review what is expected and get official Change Champion sign-ups. This should be completed prior to kick-off, if possible
- Proved a document of expected responsibilities
• Establish KPIs for bonus/ additional compensation considerations to acknowledge Change Champions’ influence
• Hold update meetings for Change Champions every other week throughout the project to keep them engaged

How do Change Champions support driving change?
Change Champions are embedded in teams whose employees are directly affected by the upcoming changes. Because they are already embedded in teams, they understand the nuances in culture that can be different from team to team, and how the impact will affect the acceptance of change. Because of this, they are trusted insiders. If the message is coming from one of them vs. an outsider imposing the message, the users are more willing to accept the changes. Change Champions will typically assist with the following for their respective teams:
• Provide feedback on messaging and planning activities
• Assist with distributing communications
• Assist with training
• Support go-live

Get more details on Change Champions here: https://www.servicenow.com/success/pillars/create-excitement-adoption.html#4-5-build

Plan your communications
In order to plan your communications, you must first assess the readiness of the audience for the change and messaging. You will need to prepare the timing of the communication and training to ensure effectiveness and communicate to the project leaders about the plan.

Communication Planning
As a good practice, a communication plan should be created – even for a small release. A plan should cover:
• Project objectives
• Audience assessment
  o How, what, why, when, and to whom you are communicating
• Documentation of the decided actions and timing
• Clear assignments regarding responsibilities for completing the actions.
  o Please note that project teams and Service Owners should be very involved in messaging, even when corporate communications and training departments are available

Communication plans will vary in complexity depending on the size and impact of a release. The plan should reflect the nature of the project and align with the key project milestones.

Communication Timeline
The timeline of the communications should coincide with the overall project
• Timelines that are shorter or longer should be adjusted accordingly
  o If a single application is being launched, the following may be all that is required:
• Lunch-and-learns two weeks prior to launch
• Fulfiller training for a single week, depending on the complexity of the release and the number of students
  o Multiple releases within a longer project should adopt an iterative approach of activities that ties to each smaller launch within the project
• Create a project theme early and incorporate it throughout communications to align messaging and signal to users that content is related to a single project
• Internal marketing should occur as soon as possible and continue through go-live
  o If possible, take advantage of the physical space available in your office with posters, table tents, and more.
  o If users are primarily remote, make sure to update common interaction zones with frequent reminders that change is coming
• Email updates should target specific user groups and include pertinent information such as upcoming training or activities
• Training should not occur too early. Plan to deliver as close to launch as possible while continuing to offer on-demand videos, job aids, and just-in-time guides

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GM = Governance Meeting
IM = Internal Marketing Initiatives
WE = Weekly Email Updates
L&L = Lunch & Learn
FT = Fulfiller Training
ET = End User Training

Communication Plan Templates available here:
https://www.servicenow.com/success/champion/communication-plan-template.html
Execution of Pre-Go-Live Communications

Following the development of the communications plan, it must be executed. Below are examples of communications and methods that should be considered:

Themes

Internal Marketing is key to getting the word out to the larger audience and should incorporate a core theme to keep people interested and engaged. The cadence of communications, theme, target audience of materials, and overall engagement should foster a fun and exciting event. Help employees understand that the impending change will enhance their ability to get their work done!

Select a theme and use it throughout the entirety of the project’s communications:

- Engage your users to select a theme by holding a contest
- Incorporate the theme into all communications, training, and marketing materials, including posters, flyers, emails, presentations, and more
- Align the theme with the organizational culture, and make sure it is something that will resonate with all users, not just the project team

Marketing Materials

Advertising the upcoming changes and associated activities is crucial to driving interest and demand prior to launch:

- Incorporate the theme from the beginning throughout all marketing materials
- Display materials in public places, wherever possible
- Provide marketing items such as stickers, lanyards, stress balls, or notepads – reach out to your account team for ServiceNow-specific merchandise
- Include important information on as many marketing and communication items as possible, such as:
  - Go-live date
  - Activities scheduled
  - Value statements
  - Where to go to learn more (internal site)

Executive Sponsor Message

The Executive sponsor’s message drives home the value and clearly outlines the project objectives and expected outcomes. Having this message come from the Executive sponsor drives the visibility and value of the ServiceNow program. This message should be:

- Presented in a way that ensures the organization understands the importance of the project
- Delivered in a large-scale environment, such as an all-hands
- Made available on-demand, post-event

Internal Site
The internal site should include all information pertaining to the project. If this is not the first phase of a project, incorporating information related to the entire project is ideal. This can be done in a knowledge article and should include:

- A schedule of events related to the project
- Videos related to upcoming changes
- Executive sponsor vision and value statement
- Training options and process to have questions answered
- A countdown to the retirement of an older system or process, if applicable, which includes the cutover date

**Executive Sponsor Governance Meeting**

The Executive Governance Meeting is critical during the implementation to ensure project goals are in alignment with the sponsor’s rollout vision. Topics to include in this meeting:

- Continued executive alignment and escalation are the key outcomes
- The project manager should conduct the meeting with the implementation partner engagement manager and other key members of the implementation team
- Only those items requiring executive visibility and decisions should be presented
- Schedule a recurring meeting (weekly or biweekly) with executive sponsors to:
  - Provide project status
  - Review any changes to the project along with potential timeline risks
  - Discuss communications involved with the project to ensure alignment
  - Present items that require executive approvals, input, or decision-making

**Weekly Email**

Proactively engaging with the target audience is critical and must be done early and often. However, it is also imperative that communications are delivered at the appropriate time and are relevant and meaningful, otherwise you risk losing the audience’s interest. For best results, closely follow the below schedule:

- Send a weekly email communication to employees that provides a high-level update
- Highlight a different aspect of the implementation with each communication
- Advertise activities that will be occurring within the upcoming week in preparation for launch
- Incorporate the marketing theme
Training

Training is a vital step in ensuring effective user adoption. Implementation partners and account teams can share resources to build custom training materials. Below are examples of effective types of training:

Lunch & Learns

This format is a great opportunity for the implementation team or service owners to engage directly with users. It will cultivate a shift from engaging in back-office activities to front-office customer service. Showing the system to potential users in an informal, fun, and inviting session will make them more likely to engage with the project and support team post-go-live to ask questions and help spur adoption. These sessions are:

- 30- to 45-minute overviews
  - For fulfillers and end users, include separate sessions with topics that vary weekly
  - For end users, emphasize changes to the user interface, this is what they will experience
  - For fulfillers, provide detailed information about how their experience will change, but also how this will affect the way they conduct business and do their daily work

- Perfect for completing demos, gathering feedback, and answering questions
- An option for launch day if followed by opportunities for hands-on assistance with the new system

Platform Training

Platform training includes step-by-step instructions to help users take advantage of platform features. It should not be associated with a specific process or service. Every user with access to more than the service portal should receive an overview of these features and capabilities. While this can be combined with fulfiller training, it is best practice to separate this training out and allow users to gain familiarity with the platform first. The training should include the following:

- Basic platform navigation
- Running reports
- Application navigator
- Views
- Bookmarks

Process Training

Process training is critical to highlight deltas, and it should extend beyond the users of ServiceNow. The most complex processes generally include integrations with other systems and its steps may be newly-automated. When developing this training, keep the following in mind:

- To be holistic, this training requires collaboration with owners of systems with which ServiceNow integrates to determine both on and off-platform changes.
- If users’ processes will change, train on the following:
The new end-to-end process
- Any changes to roles and system dependencies

- Be sure to clearly identify:
  - In which systems specific steps take place
  - Areas where new automation has been introduced

- ServiceNow does not offer process training, but many partner organizations do. Account teams can provide contact information.

Fulfiller Training
Training fulfillers is one of the most important aspects of a successful go-live strategy. The new processes, program, and platform may be superior to what was previously in place. If not provided with proper guidance and resources, changes can lead to frustration and confusion. To ensure success:

- Conduct fulfiller-specific training
  - This training must focus on how fulfillers will use ServiceNow to do their jobs
  - Complete separate fulfiller training sessions for different roles.
    - This may mean that some users need to attend more than one session if they have a cross-functional role.
  - ServiceNow offers fulfiller training resources. For more information, contact your account team.
- Include the following topics:
  - Basic navigation of the ServiceNow interface and platform features
  - Step-by-step instructions for the implemented process
  - Live demo of the process
  - Desktop guides with screenshots of each process for quick reference post-go-live

End User Training
The ServiceNow experience for end users should be intuitive and require little-to-no training. For additional support during the transition, provide end users with overviews and on-demand training. Offer one or more of the following resources to ensure a smooth transition:

- Desktop Reference Guides (DRGs) with simple, step-by-step instructions
- Brief videos showing how to interact with the portal, as well as how to ask for help, request a new item, or search the Knowledge Base for self-service assistance
- Capability highlights for users
Go-Live

The launch party should be one to remember, focusing on recognition, celebration, and inclusion. Everyone should be invited, not just the project team. Be sure to include teams that may be implementing a new service soon.

Launch All-Hands

An executive sponsor should communicate the value and expected outcome of the ServiceNow project at the all-hands, highlighting their sponsorship of the efforts. This statement can be made at a scheduled all-hands event or can be delivered at a ServiceNow project-specific event. Regardless, the following must be true:

- Include project staff, fulfiller users, end users, and potential/future users as the audience
- Include representatives from other business units or services being considered for the ServiceNow program
- The message must be positive, one that makes it clear that this is a new, exciting direction for the organization

Recognize Champions

Implementations are difficult, and those who ensure their success deserve recognition. Highlight the contributions of the project team and Change Champions. This will encourage them to continue their efforts and it will also inspire others to follow their lead. These individuals can be recognized with:

- Certificates of Achievement awarded to them at the launch party
- Features in newsletters
- ServiceNow swag
- Award them the title of Super Users post-launch, who can assist team members

Customer-Focused Launch

Fulfillers will be daily users of the system. Make go-live fun by including games and contests for them to play throughout the first week following implementation. Give prizes to individuals who complete specific tasks.

End users should not require as much training, but resistance to change may be strong. Combat that with persistent engagement, such as:

- On-demand videos with step-by-step instructions to complete common tasks
- Implement a tech lounge with experts available in the lunch room, common areas, or online at lunch, to assist end users and answer questions
- Schedule virtual Q&A sessions for the first 1-2 weeks daily, posting all questions to an FAQ article
- Play games, offering both intrinsic and extrinsic rewards to end users who complete certain activities, posting the names of winners where everyone can see
The Party

Celebrating go-lives with cake is a ServiceNow tradition. Contact your account manager to inform them of your upcoming go-live and get a cake for your go-live!

Go-live celebrations are about more than the cake. They’re about recognizing accomplishments, reiterating the value of the project, and building excitement to gain adoption of the new system. This is a fantastic way of driving awareness, both with those who currently use the system, and those who may in the future. Remember communications best practices at the party:

- Continue the use of the project theme, using posters and flyers to share accomplishments and promote the party
- Have the executive sponsor address the audience and talk about what’s been accomplished, but more importantly, discuss what’s next
- Invite additional executives from other areas of the organization to learn more about the business initiatives, issues addressed with the go-live, and how it could be helpful to their organization
- Request attendance from all employees so that everyone can celebrate and learn together
- Take advantage of teleconference capabilities for multi-location parties
- Party in public areas, where others can easily stop by on a break, and where a passerby may be enticed to attend
- For those who couldn’t make it to the party, deliver some cake and an informative flyer
- Set up laptops or tables to play games in the instance so that people get used to the new system

Post-Launch

Once the implementation is complete, adoption is still not guaranteed since users of the system may lose interest and fall back into old patterns without coaxing. As such, it’s important to continue adoption activities.

Marketing

Make use of the same theme and material types to continuously market the program and improvements. This can include:

- Infographics related to the achieved outcomes and realized value
- Posters to drive demand for/interest in ServiceNow
  - Advertise departmental successes
  - Include steps interested parties can take to be considered as the next service for implementation
- Newsletters, either new or existing, are great ways to provide rolled-up information to users
  - Include a highlights section with achievements
  - Share a strategic vision and roadmap

Continued training

Training cannot be delivered once and considered complete. Users require reminders, especially those who do not use these services daily, and content must be fresh.
Consider offering the following sessions post-launch:

- Refreshers with best practices, potentially in Lunch & Learns
- Opportunities for service providers to showcase offerings and achievements
- Communications highlighting common mistakes and ways to avoid them

**Success Stories**

Capturing and providing success stories is critical to the communication and adoption of the platform. These success stories focus on the services that have already been launched and the value realized. When developing these success stories, be sure to:

- Make them available on-demand in the Knowledge Base
- Feature stories on the portal
- Incorporate them in communications, trainings, webinars, and marketing items
- Focus on as many organizations, personas, and use cases as possible

**Surveys**

Sending surveys post-launch is an effective way to let users know improvements are going to keep coming. While most organizations complete surveys, they only request feedback after the closure of an incident or case. This is helpful to organizations that provide specific service, but it does not provide data that’s helpful in prioritizing enhancements to the platform.

To get this kind of data, regular, experience-focused surveys must be triggered to:

- Allow users to provide immediate feedback regarding their specific interactions with the system
- Provide the ability to obtain information on a regular basis related to overall experience
- Deliver important data related to what customers expect

**Sample survey questions available here:**