Take Control of Apps, Projects, and Financials Journey
Document

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Introduction

This document is an overview of the ServiceNow reference architecture for the journey related to taking control of apps, projects, and financials. This document should be used as a framework to assist with determining the steps to mature your use of the ServiceNow platform capabilities.

This document includes the answers to a series of ‘how’ questions:

- How to take control of apps, projects, and financials at the executive level
- How to achieve the outcomes in the executive overview of how to take control of apps, projects, and financials
- How to measure to ensure outcomes in the executive overview of how to take control of apps, projects, and financials are achieved
- How to increase adoption through the outcomes measured for achievement in the executive overview of how to take control of apps, projects, and financials
- How to implement the appropriate capabilities to increase adoption through the outcomes measured for achievement in the executive overview of how to take control of apps, projects, and financials through each phase of the journey
- How to technically configure the appropriate capabilities implemented to increase adoption through the outcomes measured for achievement in the executive overview of how to take control of apps, projects, and financials through each phase of the journey
- How to architect the technical configurations of the appropriate capabilities implemented to increase adoption through the outcomes measured for achievement in the executive overview of how to take control of apps, projects, and financials through each phase of the journey
• How to coordinate with experts to assist with:
  o Architecting the technical configurations of the appropriate capabilities
  o Implementing to increase adoption
  o Measuring achievement of outcomes
  o Taking control of apps, projects, and financials

For more information or to get a personalized presentation on how this applies to your organization, reach out to your ServiceNow Account team. If you aren’t sure who to reach out to, go to https://www.servicenow.com/contact-us.html, and click on sales to find the office nearest you.

How to Take Control of Apps, Projects, and Financials

The “How to” diagram above illustrates the multi-step process at the executive level, focusing on the core functional areas and understanding where interactions and integrations are required.

The steps shown are as follows:
  1. Link real costs from the general ledger to a full inventory of IT’s infrastructure, applications, and business services.
  2. Select the right investments, teams, and tactics to drive the best business outcomes.
  3. Execute all work on time and within budget using waterfall, agile, and hybrid methods.
4. Prove the successful achievement of goals and targets.

Customer Journey

Outcomes

Upon reviewing the above how-to document, many organizations may ask, “Yes, but how do I achieve those outcomes?” In order to do so, the Customer Journey is a three-phase progression (Modernize to Transform to Innovate) delivering business value via outcomes by employing product capabilities phase by phase.

The image above displays a three-phase maturity model: ‘Modernize’ to ‘Transform’ to ‘Innovate,’ which is realized as a progression through three phases focused on a unique set of consumers to deliver specific business value via a set of targeted outcomes. The capabilities identified represent key elements of the software leveraged to realize this business value.

The three phases are as follows:

- **Modernize: Visibility and Alignment**
  - Single system of engagement to align the work of IT to the voice of the customer
  - Single system of record for all ideas, demands, projects and applications
  - Business expectations aligned with service price models

- **Transform: Enhanced Execution**
  - Agile, waterfall and hybrid execution of work
  - Resource visibility across all work creating greater efficiency and management
  - Align portfolios to business outcomes
  - Applications categorized and strategically aligned
  - Visibility of service consumption, and operational costs

- **Innovate: Speed of Business**
  - Business partnership and awareness of total cost of service to shape service portfolio
  - Focus on business driven portfolio roadmaps and lean portfolio environment
  - Proactive financial forecasting
  - Investment in innovation and strategy increases, agility at the core, delivering at the speed of business
- Align portfolios to business outcomes to business outcomes
- Applications categorized and strategically aligned
- Visibility of service consumption and operational costs

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**Metrics**

As previously stated, the Customer Journey is a three-phase progression from Modernize to Transform to Innovate. Once organizations are aware of the progression and requirements, they may ask, “Yes, but how do I measure achievement of these outcomes?” In order to ensure this measurement:

- Organizations move through these phases through measurements and metrics, using appropriate Key Performance Indicators.
- The below are a catalog of KPIs that provide a measuring stick for progression across the different phases of the Journey that were compiled from ServiceNow customers, partners, and ServiceNow’s experts in the field.

The KPIs necessary to navigate through the phases are as follows
• **Modernize: Visibility and Alignment**
  - Number of apps under management
  - Number of demands going through pipeline
  - Reduced amount time for demand cycle
  - Number of demands converted/ deflected (-/+)

• **Transform: Enhanced Execution**
  - Reduced cycle time for budget/ portfolio planning
  - Increased stakeholder satisfaction
  - Reduced project rebaselining due to resource constraints and inaccurate effort estimation
  - Reduced redundant applications per capability
  - Decreased project cycle time due to increased agility

• **Innovate: Speed of Business**
  - Reduced delta in forecast to actual budgets
  - Increased accuracy in Capital vs. Operational Expenditure
  - Increased number of strategically alleged projects
  - Decreased demand through deploy cycle time

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**Adoption Journey**

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The Adoption Journey
Take Control of Apps, Projects and Financials

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
<th>Step 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect and Inventory</td>
<td>Align with the Voice of the Customer</td>
<td>Execute with Agility</td>
<td>Deliver Business-Driven Value</td>
<td>Measure Everything to Deliver Action</td>
<td>Innovate at the Speed of Business</td>
</tr>
</tbody>
</table>

- **Collect and Inventory**
  - Collect and Inventory all applications, demand and projects

- **Align with the Voice of the Customer**
  - Alignment with the voice of the customer through ideation and price models

- **Execute with Agility**
  - Use the platform to deliver agile and traditional projects and enhancements, end-to-end resource management,
  - Create meaningful application categorization
  - Utilize the platform to make service-aware decisions

- **Deliver Business-Driven Value**
  - Establish alignment of portfolios and budget with enterprise and line-of-business strategy
  - Deliver and measure value-focused delivery of IT services

- **Measure Everything to Deliver Action**
  - Application portfolio roadmaps created to shape demand
  - Total service costing utilized to support planned vs. actual decisions

- **Innovate at the Speed of Business**
  - Creation and refinement of predictive analytics
  - Management of IT budgets for all build and run activities
  - DevOps and mobile access implemented to increase velocity and business engagement and satisfaction

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Once organizations are able to measure for achievement, they may ask, “Yes, but how do I ensure these solutions are adopted?” The adoption journey represents the step-by-step
progression of activities from phase commencement to full user adoption for the phase. Activities typically commenced per phase are indicated by colored check mark.

Each of the ServiceNow solutions provide a multi-step, prescriptive approach, to adopting the solution.

1. Step 1 – Collect & Inventory
   a. Collect and inventory all applications, demands, and projects

2. Step 2 – Align with the Voice of the Customer
   a. Alignment with the voice of the customer through ideation and price models

3. Step 3 – Execute the Agility
   a. Use the platform to discover agile and traditional projects and enhancements, end-to-end resource management
   b. Create meaningful application categorization
   c. Utilize the platform to make service-aware decisions

4. Step 4 – Delivery Business-Driven Value
   a. Establish alignment of portfolios and budget with enterprise and line-of-business strategy
   b. Deliver and measure value-focused delivery of IT services

5. Step 5 – Measure Everything to Deliver Action
   a. Application portfolio roadmaps created to shape demand
   b. Total service costing utilized to support planned vs. actual decisions

6. Step 6 – Innovate at the Speed of Business
   a. Creation and refinement of productive analytics
   b. Management of IT budgets for all build and run activities
   c. DevOps and mobile access implemented to increase velocity and business engagement and satisfaction
After ensuring adoption of the outcomes, organizations may ask, “Yes, but how do I determine which capabilities are necessary to achieve these outcomes?” The steps outlined above, when combined with the Journey approach, will allow organizations to understand how to implement and get value from the solution. However, which capabilities are really being used in the overall solution?

This visualization groups the capabilities of the ServiceNow portfolio into consumable areas. From the bottom up

- **The Cloud Infrastructure** that ServiceNow maintains is at the core of delivering a fault-tolerant and highly available system.
- **The Platform**, which encompasses much more than we can articulate on a single slide, delivers core functionality across every application in the portfolio, from Knowledge Management to Open Frame as a conduit for Call integrations. Moving upwards, we begin to leverage that platform for key application and management areas that enable more and more capability into the environment.
- **Operations Management** is focused on enhancing and enabling the operational aspects to include Event enrichment, Cloud Operations and Automation.
- **Analytics** looks at both reporting and driving a more performance-based approach to visualizing and managing based on insights.
- **Application Development** provides an ecosystem to enable a more agile and effective application development framework on the Platform. This capability is utilized both for

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### Capability Roadmap

**Overview**

#### Cloud Infrastructure
- Highly Available
- Fault Tolerance
- Paired Data Centers

#### Platform
- Knowledge
- Collaboration
- Notification
- On-Call
- Business Rules
- Workflow
- Open Frame

#### Operations Management
- Incident Management
- Problem Management
- Change Management
- CMDB
- SLA Management
- Release Management
- Asset Management

#### Security Operations
- Vulnerability Response

#### Security and Compliance
- HR
- Legal
- Finance
- Marketing
- Facilities

#### Customer Service
- SLA Management
- Release
- Asset

#### Application Portfolio
- Agile Development

#### Service Management
- Reporting
- Performance Analytics
- Development Environment
- Test Management

#### Business Management
- Demand Management
- Financial Management
- Application Portfolio
- Project & Portfolio Management
- Resource Management
- Vendor Management

#### Integrations & Systems of Record
- Web Services
- MID-SERVER
- ODBC
- REST

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building business applications, as well as managing the configuration of the portfolio itself.

- **Service Management** encompasses the core of IT Service Management, as well as Enterprise Service Management areas, like Human Resources, Customer Service, Facilities, etc.

- **Security Operations** is the area of the portfolio that enables organizations to detect and eradicate security-related risks in a standardized and governed manner.

- **Business Management** area highlights capabilities around managing the business elements that impact the organization. This is focused on managing portfolios, resources, and overall governance of the environment.

- **Engagement and Experience** areas on the left, include how consumers interact with the capabilities on the platform.

- On the right side, it’s about the **externalized integrations into systems of action, reference, and of record.**

**Modernize**

In the Modernize Phase, highlighted in the orange boxes, organizations begin to implement foundational components to deliver on the overall requirements.

This phase focuses on the initial capabilities required to take control of apps, projects and financials. These foundational capabilities include the following from each of the functions:

- **Business Management:**
  - Demand Management
  - Financial Management
There is a force multiplier as it relates to ServiceNow’s overall solution set. The use of core platform functionality, such as reporting, workflow, as well as the Cloud infrastructure, delivers a more enhanced solution to deliver on the Cloud Management approach.

Transform

In the Transform phase of the Journey, organizations begin to take advantage of more and
more platform capabilities. They begin to add additional Analytics and Intelligence in the overall process.

This phase focuses on the transformational capabilities required to take control of apps, projects and financials. These foundational capabilities include the following from each of the functions:

- Business Management
  - Resource Management
- Service Management
  - Problem
  - Release
  - Asset
- Engagement and Experience
  - Catalog
- Application Development
  - Agile Development
  - Test Management
- Platform
  - Knowledge
  - Collaboration
  - Notification
  - Time Tracking
  - On Call
  - Business Rules
  - Workflow
  - Open Frame
In the Innovate Phase, organizations now have a firm foundation of Insight and Operational effectiveness.

This phase focuses on the innovative capabilities required to take control of apps, projects and financials. These foundational capabilities include the following from each of the functions:

- **Engagement and Experience**
  - Mobile

- **Operations Management**
  - Orchestration
Building on the previous images, organizations can see the evolution of capabilities needed to drive this solution, from Modernize, to Transform, to Innovate. This phase focuses on the final capabilities required to take control of apps, projects and financials through common interactions. These foundational capabilities include the following from each of the functions:

- Extensions
  - Common Interactions
- Service Management
  - HR
  - Legal
  - Finance
  - Marketing
  - Facilities
Building on the format in the previous images, the next few diagrams will highlight interactions among capabilities and areas. This should provide a clearer picture of what’s happening between those components at each phase of the Journey.

Each line in the above diagram represents data interactions between capabilities, and the black boxes identify what those interactions enable for the organization. These interactions are as follows:

- **Process Automation**
  - Demand Management
  - Application Portfolio
  - Project & Portfolio

- **Ideation**
  - Demand Management
  - Request

- **Demand Reporting**
  - Reporting
  - Portal
  - Demand Management

- **Portfolio to CIs**
  - Application Portfolio
  - Project & Portfolio
  - CMDB
The transform phase builds upon the capabilities available in the modernize phase with interactions and additional value elements to deliver the overall solution. At this point, organizations start to see more inherent collaboration, technology integrations, and better overall visibility.

Each line in the above diagram represents data interactions between capabilities, and the black boxes identify what those interactions enable for the organization. These interactions are as follows:

- **Project Catalog Enabled**
  - Catalog
  - Demand Management
  - Project & Portfolio

- **Problem Driven Demand**
  - Demand Management
  - Problem

- **Project Drive New Assets**
  - Project & Portfolio
  - Asset

- **Project Generate Requests**
  - Project & Portfolio
  - Resource Management
In the Innovate phase the interactions are key to finalizing the delivered solution. This rounds out the overall approach and solution design.

Each line in the above diagram represents data interactions between capabilities, and the black boxes identify what those interactions enable for the organization. These interactions are as follows:

- **Mobile Experience Enable**
  - Mobile
  - Application Portfolio
  - Project & Portfolio
  - Release
  - Agile Development

- **DevOps Enablement**
  - Orchestration
  - Release
  - Agile Development

- **Orchestration to External Systems**
  - Orchestration
  - Mid Server
Once organizations understand the interactions required between capabilities to take control of apps, projects and financials, they may say “Yes, but how do we build integrations with external systems to architect for success?” In every solution, there is the potential for external integrations into systems of reference or record that provide additional capabilities not found on the platform. The integrations are linked to their core capability, and external systems are denoted outside of the Platform Cloud ecosystem.
Finally, once organizations know how to implement integrations to ensure the proper architecture, they may say “Yes, but how do we find the appropriate technical resources to assist with these implementations?” ServiceNow customers can look to ServiceNow’s Professional Services team to speak to how they can assist in ensuring the organization is able to come along for the journey. ServiceNow has created prescriptive approaches to delivering the defined solution in a phased approach.

- Each phase of the Customer journey includes
  - A set of Consulting approaches focused on readiness, assessment, and process implementation
  - Implementation services for application and capability integrations
  - Training to educate users, operators, and teams on how to use the technology to achieve the agreed upon outcomes
    - ServiceNow offers a set of prescriptive training classes for HR administrators and agents, as well as different operators
    - During each phase, there will be specific training elements to help organizations get the most value from the solution.
  - In the Transform phase, training around Performance Analytics will help them get the most from dashboards and measurement reporting on the appropriate KPIs.
  - In the Innovate phase, Professional Services will add Orchestration training to help teams create integrated and
automated flows to drive requests and life events in a low touch manner.

Next Steps
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