Business-smart customization

Frequently asked questions

Definition

How are we defining customization?

- In our Customer Success Center resources, we define "**customization**" as business demands for custom functionality. When referring to implementation, we refer to both configuration and custom development (both on ServiceNow® applications and new applications).

- **Configuration** includes capabilities and/or features on the Now Platform® that enable organizations to deliver against "custom" business demands in a safe and supported way (such as modifications to forms or table extensions). While organizations should avoid over configuration—for example, by adding excessive forms or UI policies—they should still use configuration as a first or preferred option to meeting business demands.

- **Custom development** includes custom development on both ServiceNow applications as well as the development of new applications by changing baseline business rules or developing new applications from table extensions. Custom development is recommended only where configuration cannot meet business demands and should employ recommended tools and methods as well as be supported by clear governance.

What is "business-smart" customization?

Business-smart customization is customization that delivers clear, validated business value in response to demonstrated business need. It consists of smart management practices and recommended development mechanisms to minimize complexity and unnecessary technical debt.

Shouldn't I stick to "out of the box" and avoid customization?

Customization can be a powerful tool to deliver on business needs, but when it's ungoverned, it creates excess technical debt that can delay upgrades and impact performance. We encourage customers to adopt "out of the box" functionality as their default, and only implement customization *when there's a clear, demonstrated business need* that can't be met with out-of-the-box functionality.

When this need exists, we encourage customers to adopt the simplest method to deliver on this need. Both of these practices require strong governance mechanisms, which are outlined in our Customer Success Center resources.

What should I do if I have excess customization?

Customers have two options to remove customization that's no longer needed. Using the "skipped changes" list (from an upgrade), customers can deprecate/remove individual customizations that aren't delivering business value.

The "line-by-line" approach may not be effective if you have a high number of excess customizations. In this case, a customer can go "back to baseline" by standing up a new production instance and migrating work and users over to that instance. This may be technically faster than a "line-by-line" approach, but requires significant organizational change management for process owners and users who may be accustomed to highly customized processes and workflows.

Customers should consult with their Solutions Consultant and Account Executive to identify their best option before proceeding.

Governance

What governance mechanisms are needed to support business-smart customization?

The prerequisite for business-smart customization is demand management, including a demand intake mechanism and Demand Board process, as outlined in our Demand management for the Now Platform resources. Once demand management is in place, you need to institute three practices:

1. A scoring mechanism that helps you evaluate the business value and potential complexity of a proposed customization

2. Clear guidance for development practices to implement approved customizations

3. Regular auditing of existing customizations to identify those that no longer deliver business value, and can be deprecated

How does customization affect upgrades?

New records or changes to out-of-the-box records that stem from customization or configuration become "skipped changes" if ServiceNow updates the same records as part of a release, e.g., from Orlando to Paris. Upgrades do not overwrite changes that a customer has made, so customers need to review their skipped changes and determine whether to revert to base, merge, or keep their changes. This review can take time – meaning that the more customizations a customer has, the more time will be required to review skipped changes as part of the upgrade process.

Related resources

How can ServiceNow help?

Start by watching our short overview video to get smart fast (the description includes links to additional resources). In addition to our Customization best practices for ServiceNow resources on the Customer Success Center, ServiceNow's Customer Outcomes group has deep experience in helping customers govern customization. Contact your Account Executive for more information.