Design an optimal agent and rep experience

What's in this Success Playbook

This Success Playbook will help you create an iterative process to design an optimal experience for your service desk staff, customer service agents, and support representatives who rely on the Now Platform® to execute and manage fulfillment processes, tasks, records, and reports. It provides best practices for:

- Understanding the requirements for improved experience design
- Working with process owners to resolve process inefficiencies and configure relevant ServiceNow® capabilities
- Resolving adoption issues to increase the use of the product and features you've implemented

Note: For this guide, we use the term "process users" to refer to everyone who relies on ServiceNow to execute and manage fulfillment processes, tasks, records, and reports, including service desk staff, customer service agents, and support representatives.

The most important things to know

Great end-to-end experience goes beyond configuring a fancy, new user interface (UI), and it depends on three key factors:

1. Designing—or redesigning—processes with users in mind
2. Building or implementing relevant ServiceNow capabilities (including ServiceNow products, applications, and features)
3. Making sure the UI meets the needs of the organization and users.

Not all pain points are due to design issues. Work closely with process owners to remove process inefficiencies and bottlenecks. Don't try to resolve them with design changes.

The payoff of getting this right

With an effective agent and rep experience, organizations can avoid rework, optimize handoffs between teams, and improve productivity. Service agents and reps are less likely to adopt or promote user adoption if the ServiceNow products and applications aren't effectively configured to meet their needs. Having an optimal design will not only help you scale

ServiceNow across your organization, but it will also shorten the time it takes to onboard process users and accelerate their adoption.

What you need to get started

Leadership support

Get support from your executive sponsor and the managers of process user teams to focus their resources and attention on the process user experience.

Stakeholders

Create a team with a background in both user experience research and ServiceNow.

When you should start this activity

Ideally, you should start considering process improvement while you're considering ServiceNow as your solution of choice.

If you're redesigning processes on ServiceNow, you must evaluate and optimize the process user experience as well.

If you've already implemented ServiceNow, look at your key milestones—upgrades or expansions—to make improvements to your process users' experience.

Playbook overview

To (re)design the ServiceNow experience for your process users that will help you capture full value from ServiceNow, follow these steps.

	Step	Outcome
Start At the beginning, you'll build your initial or foundational capability. This includes setting up initial frameworks, defining roles, and clarifying your objectives.	**Step 1 –** Evaluate the current process owner experience	You should have a clear understanding of the activities your process users perform and the pain points in their current experience.
	Step 2 – Identify opportunities to improve the process user experience	You should have a clear understanding of and requirements for improved process and design.
	Step 3 – Configure the platform for an optimal process user experience	You'll have deployed the right capabilities to support process user needs and optimize the user interface design.
Improve As you improve, you'll take steps that help you reach your objectives and see value fast.	**Step 4 –** Help process users adopt and use the platform effectively	You have educated process users on ServiceNow capabilities and trained them to use the platform effectively.
Optimize Last, you'll refine and expand your capabilities so you can scale as you grow and continuously get more from using ServiceNow.	**Step 5 –** Continuously improve the process user experience	A standing process is in place to identify and resolve gaps in design and experience.

Step 1 – Evaluate the current process user experience

KEY INSIGHTS

- Learn about the business issues you want to resolve so you can create a better process user experience.
- Define your measures of success.
- As part of your analysis, identify the barriers process users face when they perform high-value activities.

As with any successful design project, your first step should be to ask two questions: Who are your design efforts for? What should the design solve?

To do this, complete these action steps:

1. **Identify and engage with process users.**

   Identify the specific functions, teams, and roles who use (or are expected to use) ServiceNow for daily work, including those managing the work processes, records, and report creation. Process users can reside across different functions, including service desk agents in IT, customer service representatives, customer support, and application owners (for subject matter expertise). They can provide different tiers of service support and may sit in front-line or management positions. Work with them through interviews and other techniques (like job shadowing) to understand how they work, their needs, and current experience.

2. **Document where the process users experience pain points.**

   Using interviews, focus groups, surveys, and direct observation, document process users' current needs and pain points. Highlight the use cases with the greatest room for improvement.

Customer insights

ServiceNow customers recommend these practices as you evaluate your current process user experience.

INSIGHT 1:

Understand the role process users play in realizing your business objectives

Many organizations' good intentions to improve design often leave them operating in a vacuum, completely disconnected from the business objectives they want to achieve with ServiceNow. At first glance, you might think that any effort to improve your agents' and reps' experience will help. What's more likely is that you'll have to make choices about where to invest in improving those experiences—choices you should make based on your vision and objectives for how work *should* get done.

Best practice – State the business issues you're solving with improved process user experience

Explicitly state the business issues you're trying to address with ServiceNow and the role that process users play in solving those issues. Work with your executive sponsor, service owners, and business unit leads to learn what the process user's role—including their associated activities and behaviors—is in your vision for transformation. If you're trying to create a consumerlike service experience for your employees, for example, what part of that depends on your process users and their behaviors?

As you engage with process users, explore the role that experience and design play in driving their current and expected behaviors. Look for barriers in their current experience that prevent your teams from meeting business objectives. Figure 1 shows a framework for identifying the process user's role in realizing business objectives.

Strategic objective	Barriers to achieving the objective	Process user's role to achieving the objective
Create consumerlike service experience for employees	Elongated service times given that data is often in an unstructured format and living in multiple tools	Process users must aim to resolve requests quickly and effectively within the first contact with the requester.
	Service experience is difficult to track as data is spread across tools and difficult to measure	Process users must accurately track all customer information.
	Extensive tribal knowledge to perform tasks	Process users must actively use the knowledge base to document and share solutions to common requests and issues.

Figure 1: Framework to identify the process user's role in realizing business objectives, including examples

As you work with individual process users, focus on understanding their activities and behaviors at a fine-grained level. Ask:

- How long does it take to complete your assigned tasks?
- What steps do you perform?
- What most affects your ability to resolve incidents or cases quickly?

Once you understand what process users do—and how those activities relate to your business objectives—you should be able to secure greater buy-in and investment for improving their experience. Capture stories (including direct quotes) about your process users' current experience that can capture the attention of the executive sponsor and key stakeholders overseeing your ServiceNow roadmap.

INSIGHT 2:
Define clear measures of success upfront

Experience and design can be inherently qualitative, which makes it difficult to set clear targets for investment or understand your starting point for improvement.

Best practice – Start with baseline metrics to evaluate the new design's success

Start by creating a baseline set of metrics that reflect the business problem(s) you want to address, and make sure they're easy to measure. Start with metrics that reflect:

- **Capability –** Can users do what they need to do?
- **Desirability –** Do users like using it?
- **Loyalty –** Will users return and recommend the platform?

The metrics you select for *capability* are the most important, because they should connect clearly to the business objectives you defined earlier. See Figure 2.

Measure of success	Explanation	Sample metrics
CAPABILITY *I can do what I need to do.*	Process users can work better and faster.	• % first contact request resolution • Average ticket closure time
DEPENDABILITY *I like using it.*	The ServiceNow interface is perceived as effective and enjoyable to use.	• Percentage of adoption
LOYALTY *I will come back and recommend.*	Process users use ServiceNow because they want to, not because they have to.	• Employee satisfaction score

Figure 2: Sample measures of success for designing a great process user experience

INSIGHT 3:
Identify opportunities for process users to play a higher-value role

Service agents and reps play a growing and important role in resolving complicated customer problems and delivering an effortless customer experience. At first glance, it may seem as though process users simply need a way to close tickets faster. In fact, they need to have the means to make decisions faster and resolve customer needs by identifying recognizable patterns, accessing readily available information, and taking advantage of automated workflows.

Best practice – Look for opportunities to improve the experience

Determine where you can improve the efficiency and effectiveness of your process users' activities. A well-designed experience should give process users more time to spend on higher-value activities.

These activities typically include opportunities for improvement:

- Documenting and sharing knowledge
- *Educating* customers on self-service and driving self-service *adoption*
- *Working across teams* to resolve customer requests without escalation

Ask your process user these questions to understand more opportunities for improvement:

- How satisfied are you with the resolution you provide on your customers' requests?
- Given a choice, what would you prefer to do for similar requests?
- What prevents you from doing this today?

Best practice – Use multiple techniques to get feedback

Use a combination of techniques to gather insight into your process users' experience. ServiceNow customers say that the most successful feedback comes when you use a combination of:

- **Contextual interviews –** Interview both support agents and their supervisors.
- **Emotional journey mapping techniques –** These help you understand key moments and tasks.
- **Card-sorting exercises –** These should require process users to prioritize their use cases or important tasks. Start with a stack of 25–35 use cases as "seeds," include blank cards for write-ins, and ask agents and supervisors to vote on the relative importance of those use cases.

What to do next

Now that you've developed a detailed understanding of your process users' current experience, you're well prepared to define and prioritize your requirements for improvements. Be prepared to revisit your understanding of the current process user experience, especially when:

- Your vision and business objectives change or you expand ServiceNow capabilities to new teams
- You redesign processes or redesign the organizational model for process user teams
- Your adoption and usage rates are below your desired targets

Have a candid conversation with process user teams at least quarterly determine which parts of their experience present the greatest barriers to realizing your business objectives.

Step 2 – Identify opportunities to improve the process user experience

KEY INSIGHTS

- Instead of taking a one-size-fits all approach, tailor your requirements and opportunities for improvement based on process user needs.
- Start by looking at fulfillment processes. A new, improved UI cannot resolve process inefficiencies that negatively impact the process user experience.

Once you've completed your research, you should be ready to define standard design guidelines for creating a great process user experience with ServiceNow.

To do this, complete these action steps:

1. **Define your process user experience requirements.**

   Synthesize your observations and notes from your discussions with process users into design requirements for the Now Platform. We recommend framing your requirements as user stories.

2. **Identify inefficiencies in fulfillment processes that impact the process user experience.**

   Many of the gaps in the way process users experience and approach their work is due to inefficiencies in existing fulfillment processes—inefficiencies that can't be solved with a better UI. Examples of process inefficiencies that impact the process user experience include handoff issues between teams, collecting unnecessary data, unclear ownership for process steps, and so on.

   Before you define design requirements for the UI and the tools they use, work with process owners to determine what experience shortfalls can be resolved with better process design and configuration in ServiceNow.

Customer insights

ServiceNow customers say these three insights are helpful as you identify opportunities to improve your process users' experience.

INSIGHT 1:
Avoid a one-size-fits-all approach to experience design requirements

Process users across your organization may perform different activities and have different challenges based on the business teams they support and type of support they offer. Depending on where they are in the organization, process users may focus on different customer issues and use different channels (phone, in person, or chat) to resolve those issues. So don't take a one-size-fits all approach to user experience requirements—that approach won't account for the differences in your process users' needs and pain points.

Best practice – Categorize your opportunities for experience improvement

Categorize your opportunities for experience improvement across your different process user teams. Make sure your requirements represent the diversity of your different process user types and needs.

> "We have two very different types of process users: one that takes requests and issues on the shop floor and others who take up large scale projects to resolve known issues. Very early in the project we realized that their needs and processes are very different. So even though we wanted them to use the same interface, we conducted separate sessions with each group to avoid discussions over conflicting needs and priorities."
>
> **– A ServiceNow customer**

When you document your requirements, clearly indicate which requirements align to different process user groups and whether they tie back to any KPIs. Identify common requirements to indicate which requirements are global versus those that are local—in other words, those that are aligned with your individual process user teams.

INSIGHT 2:

Don't resolve process issues with design

Not all process user pain points can be resolved with an improved UI. But many of them can often be resolved with minor changes to a process, for example, by assigning an owner to the task or by smart use of an underused feature.

Instead of creating a complicated new feature or configuration, work with process owners to find the best path to resolve an identified pain point. This will not only help fine-tune your processes, but it will also help you discover opportunities to adjust your ServiceNow roadmap and simplify the design in your ServiceNow configuration.

Best practice – Get to the root causes of pain points

Understand the root causes of your process users' pain points to diagnose which are due to the process as opposed to feature use or UI design. Break the fulfillment process into steps (see Figure 3) and work with process users to ensure you understand where, exactly, their pain point lies.

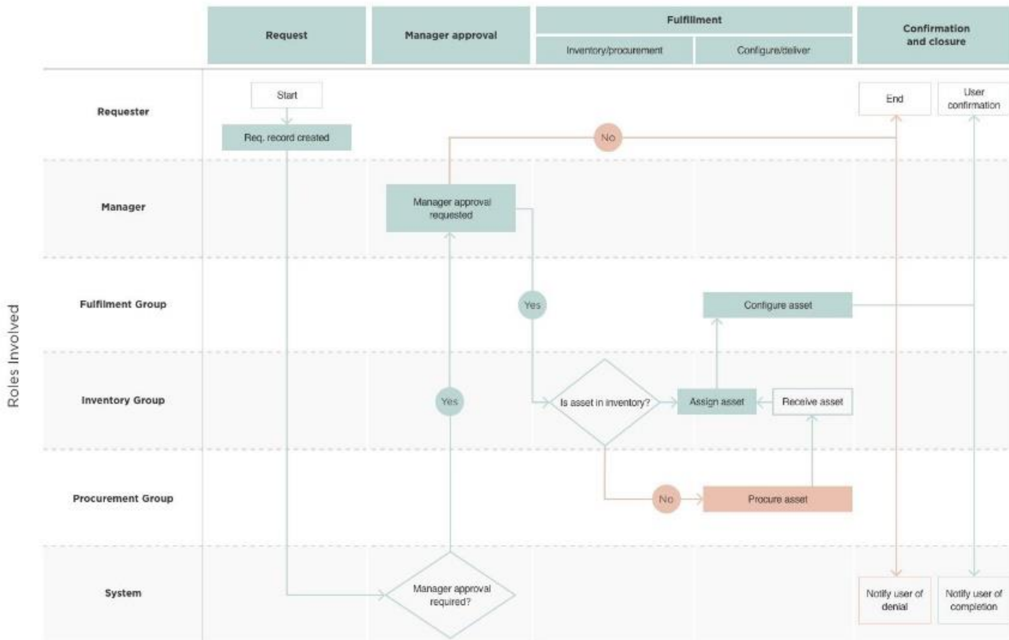

Figure 3: Example of a fulfillment process map

Once you understand the current process, use the process of elimination to determine where you should focus to resolve the pain point. It might be through improvements to your process, your ServiceNow product portfolio, feature use, or UI design. The decision-making framework in Table 1 will help you get started.

What is the root case of the experience pain point?		
	Indicators	**Action steps to resolve**
Are there inefficiencies in the process?	• A missing step in the process • Unclear ownership of tasks • Unclear task goals • Complicated flow • Missing Information • Unnecessary steps	Work with process owners to resolve this
Are there additional ServiceNow products or modules that may help simplify the experience?	• An effective process, but with many manual tasks • Lack of effective technology to automate the use case	Mark it as an opportunity to extend ServiceNow by implementing new features
Is there an existing ServiceNow feature that can help?	**Indicators of feature configuration issues** • The feature is enabled but process users don't have access. • Process users have access, but the feature isn't working as expected. **Indicators of adoption issues:** • Process users are unaware of the feature. • Process users don't know how to use it.	If the relevant feature isn't correctly enabled, mark this as a feature configuration problem to fix. Otherwise, mark it as a feature adoption problem to fix.
Is this a user interface issue?	• Pain points are due to issues like navigation difficulty, complicated click-through paths, ineffective search, etc.	Mark this as a UI design problem to fix.

Table 1: Decision-making framework to determine the root causes of process user pain points

EXPERT TIPS

As you work with process owners to create process change, always approach them with questions like, "How can we help resolve this issue for you?" or "how can we help you make this work better for you?" Highlight how the change will help them meet their objectives faster and simplify process with automation and effective workflow management.

Process users are focused on resolving customer issues and requests as quickly as possible. They, and their managers, are likely to be averse to making any major process change that may affect their daily operations. Instead of trying to completely change the process (unless necessary), position your ServiceNow deployment as an opportunity to improve the process user experience with more effective technology design and simplified workflows.

INSIGHT 3:

Look at process changes through the lens of the agent and rep experience

The danger of too much process change or improvement efforts—even well-intentioned ones—is that they work to resolve process user pain points from a logical perspective but may fail to anticipate how process changes will be experienced "on the ground" with fulfillment teams.

Best practice – Evaluate the impact of changes before you implement

Before implementing process changes, evaluate the impact they're likely to have on the overall process user experience. Talk through multiple different scenarios—or involve process users in process design efforts—to evaluate the impact of changes across people, process, and technology factors. Use these questions as a starting point:

- People:
  - Does the process change resolve key pain points that process users are frustrated with?
  - Does the process change help make the process users' overall day-to-day experience delightful?
- Process:
  - Does the process change reduce the number of process steps or clarify them?
  - Does the process change help close requests or tasks faster?
- Technology:
  - Does the process change reduce process users' effort in using ServiceNow products and applications?
  - Does the process change help process users navigate better across topics, pages, or data points?

EXPERT TIP
Account for "downstream" ramifications that may arise for other groups affected by the process before you make process changes.

What to do next

With clearly defined requirements and opportunities for improvement, you're ready to identify which ServiceNow capabilities you want to implement and configure to deliver a better process user experience. Bear in mind that, with time, your process users' needs and pain points will change. Be prepared to revisit the requirements you've defined as you identify new needs and pain points.

Revisit your opportunities for improvement and revalidate your process users' experience requirements both during upgrades and before you implement new ServiceNow applications and products.

Step 3 – Configure ServiceNow for an optimal process user experience

KEY INSIGHTS

- Engage process users as you configure and design their experience in ServiceNow.
- Diagnose and resolve barriers to using products and services so your design doesn't fail.

Once you've defined clear design requirements—and you've worked to resolve your process gaps—your next step is to look at the experience through the lens of better configuration and ServiceNow use.

To ensure success, complete these action steps:

1. **Deploy relevant ServiceNow capabilities that improve the process user experience.**

   Work with your ServiceNow account team and your implementation partner to identify and deploy relevant Now Platform capabilities that will address the design requirements and process improvement opportunities you identified in Step 2. Take advantage of out-of-the-box functionality when you can to avoid complexity and technical debt during upgrades.

2. **Give process users the required access.**

   As you learned in Step 2, different process users have different needs and pain points. So make sure they receive the right level of access to different capabilities and features based on what they need to perform their job effectively. Work with your implementation partner to design a comprehensive ServiceNow user administration strategy with clearly defined user roles and user criteria that control access to the features and capabilities in ServiceNow applications and products. Regularly monitor and manage user sessions to remove or inactivate users who no longer require access.

3. **Optimize the UI design.**

   Once process users have access to the right ServiceNow applications and features, focus on designing and configuring their UI to ensure ServiceNow applications are easy to use, both individually and with other applications.

Customer insights

Our customers recommend these approaches to configuring ServiceNow.

INSIGHT 1:

Approach the design process for the process user's UI as you would for a consumer UI

Organizations don't always invest as heavily in UI design for process users as they do for employees and customers. But effective UI design is as—or more—important for process users since they spend most of their time working with the ServiceNow interface.

Take a human-centered approach to design an optimal experience, one that lets process users operate most effectively, and the way they want to, based on their local context and preferences.

Best practice – Engage process users throughout the design process

It's ineffective to design in isolation from your process users. You can't build empathy with the process users and their environment unless you connect with them throughout the design process. They're most familiar with how they can make the best use of ServiceNow to resolve service requests quickly and efficiently.

Meet with a small, representative group of different process user types and personas who can give you useful, current feedback and co-design with them. Ensure the group is representative of the different process user types and personas you identified in Step 1. Opportunities to engage process users in your design activities include:

- Review and prioritize requirements – Conduct card-sorting exercises.
- Co-design wire frames – Use paper and sticky notes to start the design from scratch and avoid any pre-existing biases on the experience flow. Remember this stage is about the actual flow of the experience—not the look and feel.
  - Co-design the UI's look and feel. Make the development effort iterative by creating the experience in chunks (or use cases) that process users can experiment with, and provide feedback on, in real time.

Is the UI the key pain point?

Process users are often burdened with multiple, different requests and frequently face data overload as they navigate across multiple windows and tools. You may find that many process user pain points are due to UI challenges.

If this is the case, work with your ServiceNow account executive team to review the features of the new ServiceNow Agent Workspace module. The module allows multitasking, collaboration, and personalization for process users.

Best practice – Make the UI consumerlike

Make sure the UI for process users meets consumer-quality standards. As you finalize your design, check the UI for these criteria:

- Is the banner frame properly configured across page views in the system settings for the UI to display the right company name, product name, and description for individual process users?
- Does the application navigator include easy access to applications and modules relevant for individual process users?
  - Have you removed or hidden navigation items process users don't need to access?
  - Have you made frequently used applications or modules available in the Favorites tab by default?
- Does the content frame flow match the workflow of the process user group it's designed for?
  - Are there any unnecessary fields on the form?
  - Do mandatory fields only include the information necessary for them to complete tasks?
  - Are the mandatory fields properly highlighted?
  - Are form design visual indicators effectively used to group and highlight related information?
  - Are data fields prepopulated with default data (or data captured from integrated applications like the CMDB) as much as possible to minimize effort?
- Are the content views optimized based on who is accessing the application or module and from which channel (desktop, mobile, etc.)?
- Is the mobile experience good?
  - Is the length of the content (number of fields in the form, titles, display titles, extras) too long so it affects the navigation experience?
  - Is the right information for decision-making highlighted so process users don't have to navigate across multiple pages?
- Are the process user–specific features correctly enabled, such as user presence, that can help initiate chat with other agents looking at an incident?
- Are the personalization features properly administered using user criteria effectively, such as personalizing a form and creating personal lists, personal notifications, and a personal dashboard?

INSIGHT 2:

Track product and feature use to get to the root causes of design failures

You may have the right ServiceNow products and features in place to ensure a great process user experience, but you find your process users either neglect them or use them less than they should.

For process users to have a good experience, track how they're currently using the products and features you've implemented and configured. This will help you diagnose where you can intervene for better use and an improved experience.

Best practice – Drive adoption through effective design, education, and enablement

There are three key root causes when users don't use a product or feature. Either the product or feature is:

- *Hated* so much that process users don't want to use it.
- *Hidden*, so process users aren't aware of it.
- *Hard* to use, which means process users don't know how to use it.

Interview a representative group of process users to identify the root cause of why they don't use the product or feature. Use these questions in your interviews:

- Are you aware of <the feature or product>? If yes, how comfortable do you feel using it?
- What do you like or dislike about it? What is hard?
- How well does this integrate with other systems or tools you use?
- When is the feature most helpful? Are there other use cases when you would like to use the feature but can't?

If the tool is poorly configured, which gives it a *hated* or *hard* root cause, go back to the drawing board to evaluate the feature's configuration for each process user group (see Steps 1 and 2). If so, reconfigure it to ensure:

- The design is optimized based on process user workflows
- Process users have the desired level of access (assigned with caution based on their role) to the product or feature
- Process users understand how data is used by others, especially when the design includes seemingly unnecessary data

If the issue is awareness (that is, it has a *hidden* root cause), educate process users on the feature(s) available to them and how these features can help them (see Step 4 for details on educating and training process users). Also show process users how a product or feature fits in a process and when to use it.

"We implemented HR case management a few months back but really struggled to drive its adoption. Our HR process users were unclear on what is a 'case,' when to tag a request or an issue as a case, and how it relates with everything else they are using. Providing the capability on the platform was not the complete solution to what we wanted to do."

– A ServiceNow customer

What to do next

At the end of this step, you should have configured ServiceNow to resolve your process users' most critical pain points and needs. Although you may have worked with an initial group of process users to identify the requirements and design your UI, ***conduct extensive beta testing***

with a larger group of process users to resolve any additional feedback or design gaps before you roll out a new feature or UI design more broadly.

At this stage, your initial design efforts may be complete, but your work to improve the process user experience isn't. For your project to be successful, process users have to adopt and use the new functionality you've designed and implemented. As your next step, help process users overcome their change inertia to adopt and use your new design and functionality.

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Step 4 – Help process users adopt and use the platform effectively

KEY INSIGHTS

- Communicate the value for process users—that is, how the design changes benefit them—in order to drive adoption and effective use.
- Use metrics that encourage process users to collaborate and promote a better experience.

Moving from multiple existing tools (and applications) to a new, consolidated ServiceNow interface can be a big change for process users. Experience cannot improve if process users don't adopt and effectively use your ServiceNow products and features. You must help process users overcome their natural change inertia and equip them with the right information to use ServiceNow products, applications, and features effectively for their needs.

To do this, complete these action steps:

1. **Educate process users on ServiceNow offerings.**

   Educate and inform process users on the key capabilities of the Now Platform and how it can help resolve their challenges and pain points. Do this in conjunction with your organization's change management initiative for ServiceNow.

2. **Train process users to use the platform effectively.**

   To ensure process users effectively use the Now Platform, encourage them to enroll for relevant ServiceNow process user training packages based on the applications and products they use. To create channels for ongoing learning opportunities, we recommend you encourage process users to share their learnings with peer networks and present them with targeted training opportunities as required.

EXPERT TIP

Remember the law of diminishing returns while designing your process user training packages. If one process user is trained and educates another process user, then the trainee likely understands less about ServiceNow than the person who trained them. Months or years later, as people move around or outside of the organization, each successive process user knows less than the previous user. So refresh your training packages based on the specific needs of your process user community.

Customer insights

Our customers recommend these ways to help process users adopt and use the platform effectively.

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INSIGHT 1:

Communicate the value your design changes have for process users

It can be challenging for anyone to adapt to a new design and experience, especially if the process user's previous experience was poor. Show your process users how the design change—in terms of a process, feature, or UI—helps them get their work done faster and more effectively. Also show them the value it will create for the entire organization.

Best practice – Solicit real evidence of value

Solicit real evidence of the value that a design change will bring to process users' day-to-day work and use multiple channels to communicate this. Work with a small group of engaged process users (probably the same group you worked with to co-design the experience in Step 3) to capture evidence of the value created through new processes and workflows, features and functionality, and/or a new UI.

You can include data (for example, the number of hours saved logging tickets into the system), quotes (about what process users liked about the new functionality), and storytelling to demonstrate the value of the change. Keep these tactics in mind as you meet with process users:

- Focus on showing empathy. Highlight the key pain points process users face in their daily work and how design changes can help resolve those pain points.
- Emphasize how the change not only helps them but also other teams impacted downstream in the process.
- Focus on the pain points most relevant to your audience.
- Use different channels to communicate your message, including newsletters, presentations and webinars, posters, videos, and peer-to-peer champions.

Best practice – Influence adoption and behavior change

Use influencing techniques to drive adoption and behavior change. Consider these options:

- Build a community of champions within your process users to spread your message of value organically. Encourage early adopters to talk to their peers and highlight specific design changes that have improved their daily work experience.
- Create a friendly competition. Gamification can be an effective technique for encouraging users to quickly adopt a new feature or functionality, or when you need to drive effective knowledge management practices.

As adoption improves, help process users collaborate to learn and resolve issues. Get your process users to attend ServiceNow events, such as Knowledge and ServiceNow User Group (SNUG) meetings, and to actively engage with the ServiceNow community.

INSIGHT 2:

Build metrics on the experience and behaviors you want to encourage

Process user performance is often measured with metrics that are readily available and easy to measure, such as *number of tickets closed* and *time taken to close a ticket*. These metrics tend to focus on task completion, which is important, but efficient task completion is the end outcome of a good experience.

If you only focus on the end results, you can take your focus away from activities that can help improve the collective experience of process users and the end users they serve. Work with process user managers to build metrics and incentives that encourage process users to collaborate and take advantage of the features that promote a better experience, both for fulfillment teams and end users.

Best practice – Use metrics that encourage process users to collaborate

Use metrics that nudge process users to collaborate and focus on the end-user experience. Work with managers to understand, measure, and incentivize the behaviors that will help process users adapt the design changes and shift to higher-value activities that promote a better experience.

This should include tracking how process users make effective use of new features, contribute to knowledge management, and drive self-service. Ideally, metrics should be designed in such a way that process users can assess their own performance to spot opportunities for improvement.

EXPERT TIPS

Show your executive support the importance of adopting the capabilities you've built and the behaviors you want to encourage. Secure and highlight buy-in not just from your executive sponsor, but also from senior leaders in your process user organization.

Consider using ServiceNow Survey Management and Performance Analytics to create and track performance metrics that directly highlight the value created by fulfillment teams with metrics like *end-user satisfaction*.

What to do next

As more process users adopt and use ServiceNow, you're likely to see new demands, needs, and opportunities to improve the individual process user experience. To meet these needs, create a standing process for continuous design and experience improvement.

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Step 5 – Continuously improve the process user experience

KEY INSIGHTS

- Set up a process to look for design gaps and resolve them.
- Create a robust decision-making framework to approve, prioritize, and schedule design changes.
- Don't aim to control all design changes in ServiceNow. Instead, give process users some flexibility to develop and change configurations.

Experience design is not a one-time activity. It's an iterative process that continuously evolves your design based on technology improvements, new process user needs, and changing business requirements.

To make your experience design iterative, complete these action steps:

1. **Proactively identify design gaps.**

   Conduct quarterly feedback sessions and surveys to surface challenges to your process users' experience in ServiceNow. Consider working with process and application owners to analyze anomalies in team performance and adoption metrics that *could* indicate design issues.

2. **Continuously resolve design gaps.**

   Instead of waiting on the next upgrade to address design issues, create processes to resolve high-priority, low-complexity issues on an ongoing basis to maintain and enhance the process user experience.

Customer insights

To continuously improve process user experience, follow these practices from ServiceNow customers.

INSIGHT 1:

Avoid scope creep

As more process users adopt and use ServiceNow, their needs will evolve, especially as new opportunities are created for them to deliver greater value. Changing business priorities mean that their pain points and needs will keep evolving. This may lead to more design change requests, which could span anything from making small configuration changes to custom development. Create an objective way to evaluate design requirements so you can identify those you must address immediately versus those that can wait for your next upgrade.

Best practice – Use a framework to separate design issues

Use a severity vs. complexity framework to separate design issues that must be fixed now versus those that can wait until your upgrade.

First, rate the severity of a design issue as:

- **Minor –** Causes some hesitation and slight frustration
- **Annoying –** Causes occasional task failure or delays; moderate frustration
- **Serious –** Leads to task failure; significant frustration

Rate the complexity of the solution required as:

- **Low –** Simple change to text, data, layout, etc.
- **Moderate –** Limited coding, workflow, or layout changes
- **High –** Requires new data sources, different application architecture, or novel functionality

Work with your key stakeholders—service owners, process owners, and fulfilment team leaders—to evaluate and validate the complexity and severity associated with each design gap.

Heads up!

Don't make changes just because a process user team has asked for it. Before evaluating whether you should implement a change now or in the next iteration, always assess why the change is important from a business standpoint and why it will help you realize business objectives.

Based on your assessment of complexity and severity, determine when you'll address the issue using a framework like the one in Figure 4.

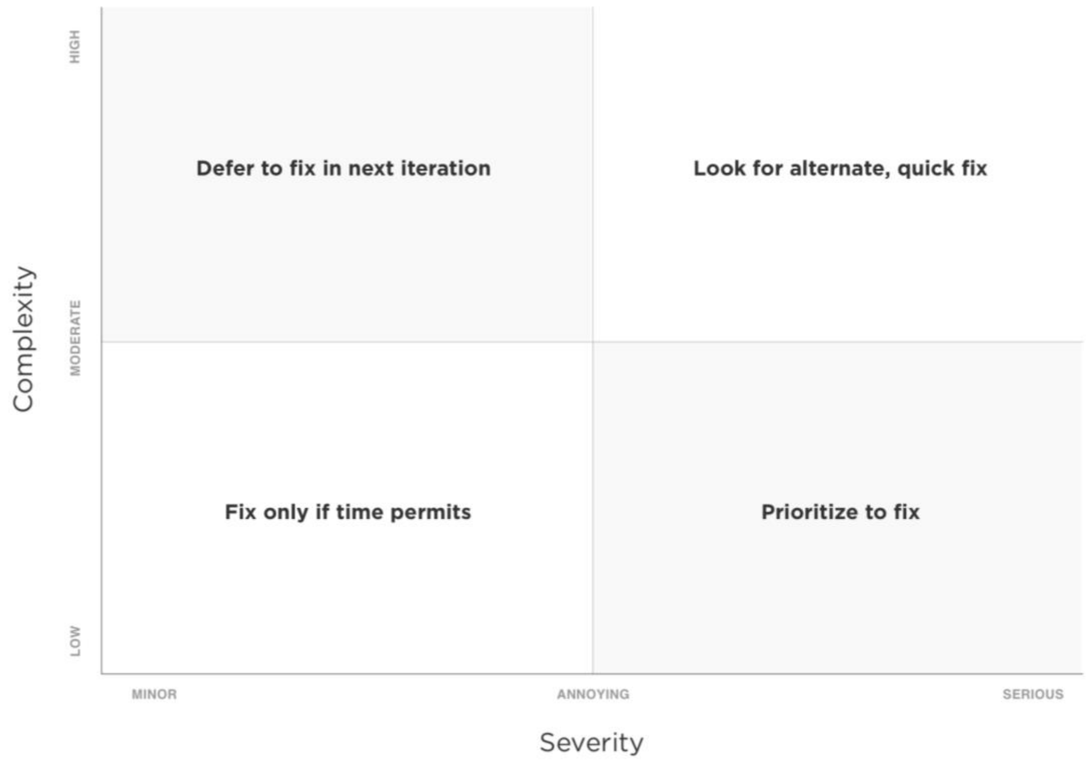

Figure 4: Framework to prioritize fixes to design issues

Note: When you evaluate and make high-complexity changes, work with your demand management board for approval and guidance.

EXPERT TIP

Make your prioritization framework transparent with process users and key stakeholders. Always communicate why you have decided to deprioritize change requests (if that's the decision you've made) and when the design issue will be revisited or resolved.

INSIGHT 2:

Delegate authority to make low-risk configuration changes that improve the process user experience

Organizations sometimes confine the ability and authority to make any change on ServiceNow to the platform team. But the platform team can be stretched with multiple, conflicting priorities and requests. This can lead to delays in making changes that are relatively easy but can significantly enhance the process user experience. Look for opportunities to delegate authority to selected process users or their managers to make low-risk changes when it's feasible.

Best practice – Build a way for process users to make changes

Build the means for process users to implement low-risk design changes. ServiceNow offers multiple features that allow non-administrators to make low-risk, scoped changes, such as adding a new catalog item to ServiceNow applications. Examples of such features include the Service Catalog item designer, scripting opportunities to create look-up tables and include additional watchlist records, and editor roles (such as catalog editor, syntax editor, and workflow editor).

Work with process users to understand what data fields and input parameters they can control and allow them to make those changes. Then they don't have to go to the admin team every time. Ensure you include the right checks to guard them from making changes that cannot be reverted.

Before you delegate change authority:

- Delegate editor rights only to those who are trained on basic platform functionality. Editors must understand the consequence of making any change in ServiceNow.
- Delegate authority to make *scoped* changes rather than *global* changes. Make good use of administrative features like delegated development to limit the impact of changes made by an editor.
- Consider having local managers (within a business line or geography) monitor and approve the local changes made within a ServiceNow application or feature.
- Always review changes to ensure only those with a valid business need or benefit to process user experience are implemented. Aim to minimize any changes made to out-of-the-box tables to avoid future upgrade issues.

What to do next

Don't let creating the optimal process user experience be a one-time activity. Instead, check in periodically on your process users to evaluate their current experience so you can to (re)define your processes to maintain that experience.

Upgrade your Now Platform at least once a year, and use the upgrade as an opportunity to enhance the experience and get your organization re-energized about your ServiceNow program.

The takeaway

To get to an optimal process user experience, you need to understand the pain points in the current agent and rep experience, and then design the right solution that helps them provide superior customer service. A great process user experience will drive ServiceNow adoption across your organization and create additional opportunities for business value.

What does “good, better, and best” look like for this activity?

Good – Your process users prefer the ServiceNow experience over other alternatives.

Better – Process users are effectively able to do what they need to do with the help of ServiceNow. They actively help identify additional opportunities to enhance the experience.

Best – Process users act as champions of ServiceNow and frequently engage in high-value activities to help end users resolve their requests and issues quickly and effectively.

What should I convey to my team?

When you optimize your process users’ experience with ServiceNow, you can expect to see greater business value. Without an optimized process user experience, your adoption rates will suffer. Focus on creating an experience that drives the following in the platform:

- **Capability –** process users can do what they need to do
- **Desirability –** process users like the way it looks
- **Loyalty –** process users return and recommend use of ServiceNow

For access to actionable insights on this topic, review our Customer Success Center resources.

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at best.practices@servicenow.com.

Appendix

Key performance indicators (KPIs)

Measure the following KPIs to determine if you've designed an optimal process user experience on the Now Platform:

- *Percentage of process users who rate ServiceNow as easy-to-use and meeting their needs* – This metric's measure of success is:
  - **Capability –** Can process users do what they need to do? (Refer back to Step 1).

  You can use a simple survey to evaluate this. Or, you can look at the task completion metrics you already have in place, such as *the percentage of requests fulfilled in the first attempt*, *average ticket closure time*, and the *average end user (or customer) satisfaction rate*.
- *Percentage of process users who rate their experience as "effective" and are likely to recommend ServiceNow to others* – This metric's measures of success are:
  - **Desirability –** Do process users like using ServiceNow?
  - **Loyalty –** Will process users return and recommend use of ServiceNow? (Refer back to Step 1).

  We recommend conducting a survey based on these metrics twice every year, at least once for every ServiceNow module or application. You can also consider tracking the Net Promoter Score.
- *Percentage of process users who actively use key Now Platform applications, such as Request Management* – This metric focuses on adoption among process users. Sometimes, even when the experience is good, process users may not adopt the new platform or features. You should continuously track feature adoption across ServiceNow applications and products to identify and resolve adoption issues.

Stakeholder management

Use the following chart to identify which stakeholders need to be held responsible and/or accountable, and which should be consulted and/or informed.

Responsible/ accountable stakeholders

- Now Platform owner
- Service and application owners
- Executive sponsor
- Adoption champions

KEY COMMUNICATIONS

- Connect the importance of the process user experience to your business objectives for ServiceNow.
- Communicate the needed investments or budget requests.
- Share findings from user experience research with process user teams.

Consulted/informed stakeholders

- The entire IT organization
- Business leaders
- Service process users
- Help desk and change management teams

KEY COMMUNICATIONS

- Solicit feedback on the experience from process user teams and invite them to participate in user experience research.
- Create awareness campaigns and training for underutilized features and capabilities.
- Share peer-to-peer success stories.

Related resources

- Agent and rep experience design
- Process redesign and optimization
- Demand management for the Now Platform
- ServiceNow NOVA methodology for experience design

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