

Create an organizational change management plan

What's in this Success Playbook

This Success Playbook will teach you how to create an organizational change management (OCM) plan that helps you mitigate risks and realize the value you expect when implementing ServiceNow®. You'll learn to:

- Determine who must be involved in and responsible for OCM planning and execution
- Identify the process and insights needed to build a plan that helps your teams adapt to a new, transformed way of working
- Use pilots and go-live celebrations to engage people in the implementation process to help them prepare and commit to a new way of working
- Plan ahead to manage ongoing organizational change as you continue using ServiceNow capabilities

Key takeaways

The most important things to know

OCM is a key part of transforming how work gets done. It's easy to overlook the need for OCM at first, but many organizations quickly realize that they won't get the full value they expect from ServiceNow (or any technology) if they don't help the people in their organization prepare for how they'll change their work. Start early and invest in excellent OCM.

The payoff of getting this right

OCM can improve your ability to realize project goals, meet timelines, and hit user adoption targets by ensuring that the people in your organization are ready to support ServiceNow.

What you need to get started

Leadership support

Enlist an OCM program lead to coordinate and lead OCM plan preparation and execution. You'll also need someone to design and deliver communications to inform the organization of the OCM program and upcoming organizational change, another person to develop and deliver on training and enablement plans, and another person to plan how to identify and recruit champions who can help convince their peers of the value of using ServiceNow.

Prerequisites

You'll need access to your technical implementation teams to coordinate the technical elements and the people-oriented OCM elements of your ServiceNow project.

When you should start this activity

Start general OCM planning as part of managing your organization's overall transformation before or at the same time as you decide to implement ServiceNow (ideally about 3 months before the actual start of the program or project). Begin to specifically manage the impact of your platform implementation as you develop your ServiceNow roadmap and implementation plan—that is, well before you kick off any implementation project so you can factor OCM-related costs into your business case. Also consider the OCM implications when you expand ServiceNow capabilities.

Playbook overview

ServiceNow recommends the five steps listed here to creating and executing an OCM plan.

	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 – Prepare to manage organizational change	You have dedicated people assigned to defined roles who can lead OCM efforts and who know what needs to happen to make OCM successful.
	Step 2 – Research your organizational change context	You have a strong sense of the people and organizational change as well as the desired outcomes of the change and the business factors driving the need for change.
	Step 3 – Document organizational change plans	You have a documented OCM plan that details findings and plans for managing organizational design changes, training and enablement needs, communications with stakeholders, and suggestions for how to minimize the impact of the organizational change.
Improve As you improve, you'll take steps that help you reach your objectives and see value fast.	Step 4 – Execute the organizational change	You have successfully piloted and launched your deployment with a solid OCM plan in place.
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 – Enable an ongoing OCM function	You have a plan to maintain your OCM roles, to improve OCM processes, and to manage ongoing OCM needs.

Step 1 – Prepare to manage organizational change

KEY INSIGHTS

- Focus on assembling the right expertise to manage OCM.
- Start with a deep understanding of why the change is occurring and what success will look like.

Getting some organizations to invest in OCM can be a tough sell. This is particularly true at smaller organizations where leaders may think that they can skip OCM because of their scale. And it can be hard to measure ROI, although the experience of ServiceNow customers shows that under-resourced OCM can make it difficult to hit project goals, timelines, and user adoption targets.

So, how do you secure leadership support for OCM?

- **Ask your ServiceNow executive sponsor to help foster support for OCM** – *Executive sponsors* can work with their leadership peers to convince them of the benefits of OCM and to secure resourcing.
- **Build OCM into your business case** – Leaders understand and respect business cases, and a well-structured case can very effectively deliver your pitch for OCM, if you frame it effectively. You can do this in two ways:
 - First, tell stories from previous failed projects to demonstrate the cost of neglected OCM.
 - Second, explain the role that adoption plays in realizing your business objectives. For example, if you want to decrease costs by automating employee onboarding, but certain regions or teams don't adopt the new process, how does that affect your total savings?

Simple, clear, back-of-the-envelope calculations, supported by stories from previous projects, can help you make your case.

- **Show your organization how realizing outcomes through strong OCM is a competitive advantage in digital transformation** – In the digital business environment, business leaders have a stronger appreciation for the competitive advantages of speed and employee experience. So if OCM supports those two things, they're more likely to invest in it.

“It's easy to neglect OCM, especially at smaller companies where you think can get away with not doing it. But at some point, that neglect will always come back and haunt you.”

– **A ServiceNow manager at an S&P 500 healthcare company**

Once you've secured leadership support and justified the need for investing in OCM, define roles to manage your organizational change and build a shared understanding of what successful OCM looks like.

To do this, complete these action steps:

1. Assign an OCM lead and program team.

Establish a team to lead and manage your OCM program. Assign responsibilities (especially those owned by the OCM program lead) to roles that can fully dedicate to managing the organizational change. Create opportunities for planning, communicating, and involving necessary stakeholders in the change process. Do this two to three months before the first implementation project kickoff to allow time for the team to complete OCM planning in time for kickoff.

2. Explore the organizational context that may affect your ServiceNow deployment and resulting OCM needs.

Ensure everyone leading the OCM effort is aware of the context of the changes and understands why OCM is necessary.

3. Set goals for your OCM efforts.

Ensure your OCM program team has a common understanding of OCM goals. Establish measurable goals and task ownership.

Customer insights

ServiceNow customers have identified two insights for setting up your team.

INSIGHT 1:

Recognize that OCM requires special expertise and skill

Many teams make the mistake of running head first into OCM planning without having the right people in the right roles. If you recognize this too late, your teams have to rely on different teams or partners to address or re-engineer a failing plan.

Building and executing a great OCM plan requires people who can empathize and think critically about how to win support. OCM team members have to adopt an unbiased, consultative perspective on the project and be able to understand both the big picture (your strategic objectives) and the tactical, day-to-day “feel” of the change at a front-line level.

Ideally, those you select for your OCM team should have the expertise, experience, and skills to:

- Understand how ServiceNow supports the organization's vision, mission, strategy, and business outcomes and connect those to how people in the organization will be impacted
- Coordinate meetings, communications, and escalations to senior leadership across many different teams and groups
- Empathize with people across all roles in your organization and use their perspectives to inform your OCM planning
- Define detailed plans that specify what your organization's users need in order to be ready for the changes in their work
- Communicate and convince your organization of the value of ServiceNow
- Liaise with technical implementation teams to align the OCM planning with process and technology changes

It's most important to make sure that the person leading OCM at your organization is up to the task. Figure 1 shows a job description that you can use as a baseline for what you should look for in an OCM program lead.

**ServiceNow organizational
change management (OCM)
program lead**

- Works with the leader/executive sponsor
- Actualizes the successful delivery of ServiceNow solutions and services for clients
- Role is consultative, strategic, and tactical
- Usually filled by a member of the ServiceNow governance steering committee
- Executes changes related to people
- Coordinates for changes related to process and technology

RESPONSIBILITIES

- Understanding the Now platform and how it supports the organization's vision, mission, strategy, and business outcomes
- Using the agreed upon operating model to drive the coordination of meetings, communications and escalations with the steering committee, project/program management, implementation, training, and vendor teams
- Supporting and building the credibility of the change management function within the organization in general and for the project
- Establishing and benchmarking readiness across the organization
- Developing and performing stakeholder analysis with executive sponsor, the OCM communication lead(s) and OCM enablement lead(s) to establish reporting relationships and networks; stakeholders' relative power, influence, impact, impact mitigation, and associated enablement needs; and audience types for the communication plan
- Reviewing and approving the communication plan for the project
- Performing continuous gap analysis (future state/current state) and risk analysis
- Analysing risk mitigation(s) for needed changes in resources—budget, time, enablement and schedule—so they're aligned with process and technology changes
- Developing the high-level enablement plan: principles of ITIL and service management processes, overview of ServiceNow, and overview of ServiceNow processes
- Planning and administrating the appropriate project/program organizational change resources, including the people and technology—websites, learning management systems, and communication tools such as video, direct mail drops, focus groups, and surveys—to support the project's or program's communication

Figure 1: OCM program lead job description

While a good OCM program lead can conduct most of the OCM planning at your organization, you'll benefit from defining other OCM roles to form an OCM program team. Figure 2 shows an ideal, fully resourced OCM team with five distinct roles.

You can give multiple roles to a single individual, or multiple individuals can fulfil a single role—what's essential is that all of the roles are fulfilled to support OCM. The number of people you need to dedicate to these roles depends primarily on how large the organizational change your ServiceNow implementation introduces—and that depends on the level of business transformation you want to achieve.

If you're implementing ServiceNow for the first time at a large organization that's unfamiliar with ServiceNow, you'll need a larger group dedicated to OCM. Smaller organizations with fewer stakeholders can sometimes manage OCM planning with even a single lead if that person has the right expertise.

If you already have a team dedicated to OCM in your organization, like an OCM center of excellence, you won't need to dedicate as many resources specifically to organizational change management. If you don't have a dedicated OCM team, dedicate at least one full-time person to oversee developing an organizational change management plan and include additional, dedicated roles to support larger-scale organizational changes. The OCM lead's most important goal is to make sure your OCM process includes preparation, research, documentation, and execution, even in a scaled-down model.

Review the responsibilities assigned to each role in this team structure and make sure you can cover them with the team members you have.

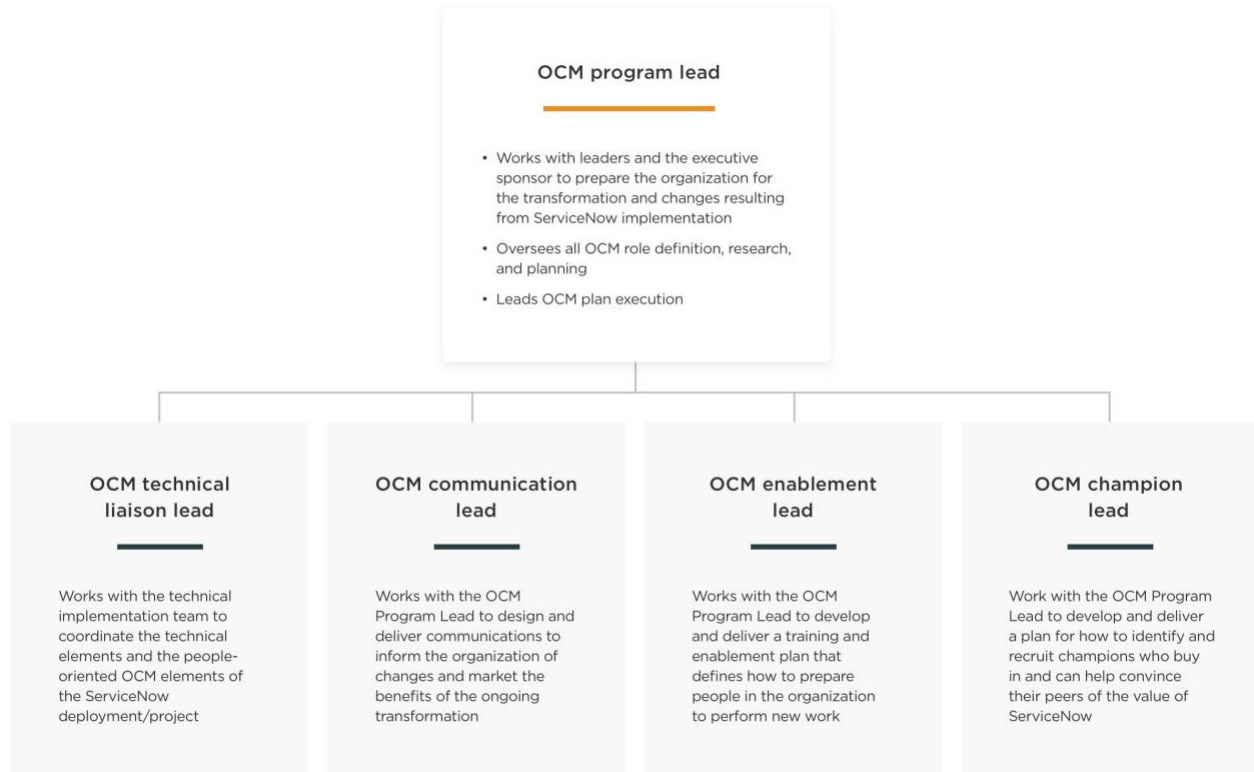


Figure 2: OCM program team structure

Best practice – Seriously evaluate your ability to support OCM using internal resources before you start OCM planning

Evaluate your level of internal expertise to support OCM by asking the following questions:

- Conduct an honest assessment of the people on your team. Is anyone able and interested in supporting this need? Can you support this with the people already on your team?
- Identify other groups in the organization that can support your OCM needs. Are there any centralized teams or services that you can lean on? For example, can you work with a central OCM team, collaborate with a corporate communications group to help with OCM communications, etc.)? Working with these centralized groups can also help if you realize you can't afford to resource OCM to the degree you need.

Best practice – Seek external help if you don't have internal OCM expertise

Seek external help (partners and/or consultants) if the OCM expertise you need isn't readily available within your organization

It always pays to get the right expertise involved in your OCM program from the start. At the point you build OCM requirements into your business case, determine whether or not you'll need external help.

"There are no silver bullets when it comes to OCM because your approach needs to be built specifically for your own organizational context and culture. It takes work and it takes a plan. And more than anything, it takes the right people with the right amount of time and focus to lead designing and executing on that plan."

– Jason Rosenfeld, VP at Cask

INSIGHT 2:

Ground your team with a deep understanding of why the change is occurring and what success means

Once a team is in place, organizations can jump immediately into OCM planning—but experience suggests that acting *too* quickly can lead teams to miss the forest for the trees.

Start your planning with a strong foundation by defining what's changing in your organization, why the change is occurring, and what's expected because of the change. You need to define the big picture for the team so you can articulate what needs to happen for your OCM effort to be successful.

Best practice – Create a thorough OCM charter

Assemble an OCM charter that outlines your OCM team's shared goals and how they'll work together to accomplish the specific project. When possible, hold an on-site meeting with all involved OCM roles to scope out the effort and set goals. Consider including in your charter:

- A written articulation of the change that requires OCM

- A justification for why the change is occurring and the value that will be delivered if the change is managed well
- A mission statement for the OCM team that explains how they will support the change
 - We recommend this as a starter mission statement: “Helping our people feel comfortable with our ServiceNow implementation and building stakeholder involvement by generating awareness, understanding, felt need, buy-in, commitment, and action.”
- An agreement recording each team member’s part in supporting the OCM effort, the resources and time they will need to contribute, and their understanding of the different groups and teams they will need to work with to successfully support OCM goals

See Figure 3 for an example of the groups and responsibilities potentially involved in OCM. Note that, while the OCM program team is in the center because they’re responsible for orchestrating all OCM work, the team is not the only group with OCM responsibilities.

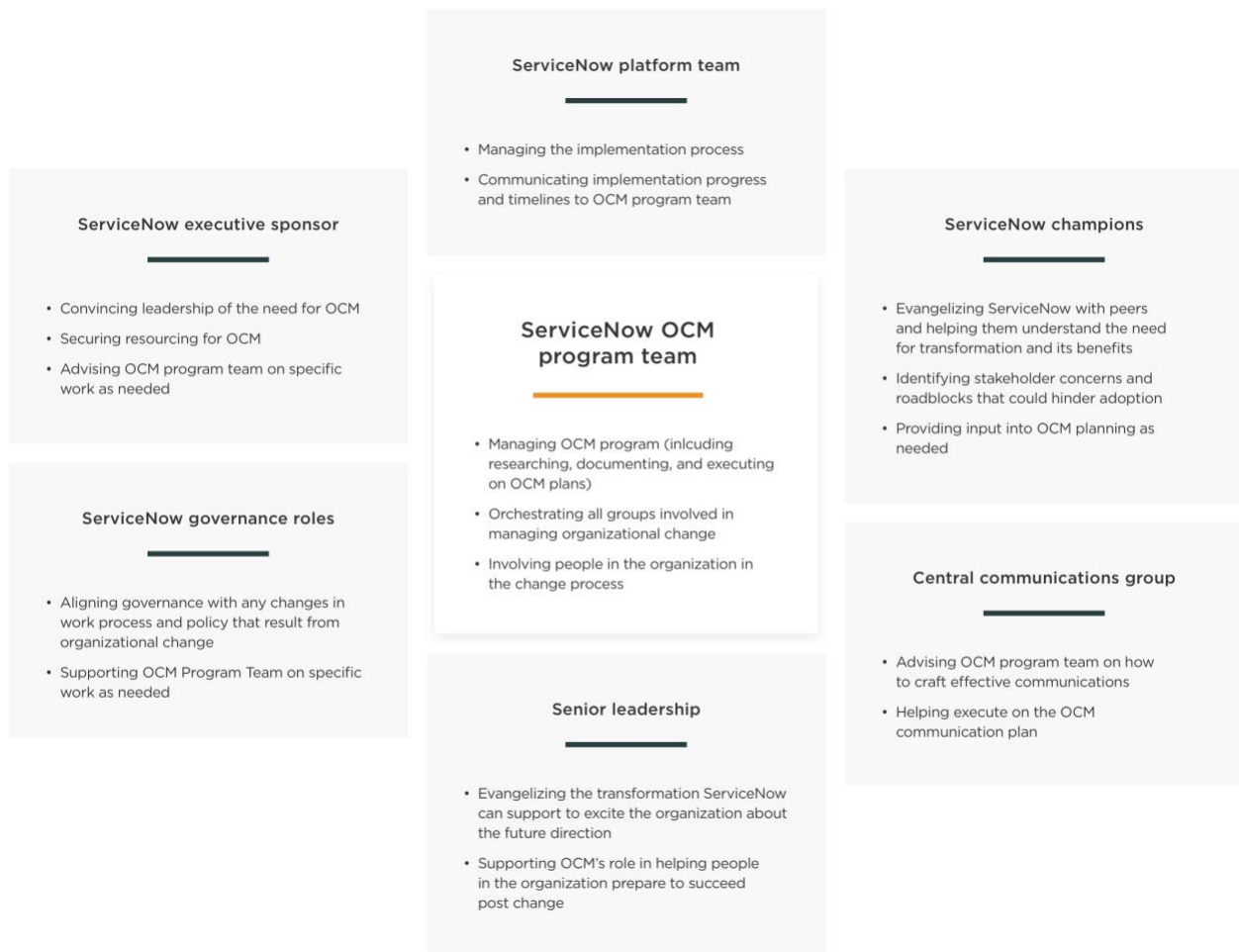


Figure 3: Teams and responsibilities involved in OCM

Best practice – Define what good OCM looks like before starting analysis and plan documentation

With the assistance of your project management office (PMO), review OCM success and failure stories from previous implementation projects and initiatives. Ask:

- In general, what typically causes changes to fail?
- What typically causes changes to fail in *our* organization specifically? How is that different from what causes organizational change failures in general?

In some cases, good OCM simply involves avoiding the pitfalls you've experienced in the past by planning better and involving the right stakeholders at the right time.

What to do next

Having established clear OCM roles and project goals, your next step is to build a strong understanding of the people and organizational context involved in the organizational change. This insight will inform how you plan to manage, communicate, and mitigate the impacts of the change.

As you do this, take advantage of any opportunities to directly engage your stakeholders. Any interactions—even those that simply introduce the OCM team—can help build empathy and provide a chance to help others understand and support the new direction.

Step 2 – Research your organizational change context

KEY INSIGHTS

- Use OCM analyses as an opportunity to engage your stakeholders and create support for the change.
- Repeat and revisit your OCM context assessments over time.

With your OCM roles in place, it's time to analyze the context that your organizational change will take place in and become familiar with the stakeholders who'll be affected by the change. To understand the context, learn how people and teams work in your organization today, and where that work is most likely to be affected by your implementation.

Completing these action steps will form the basis for your organizational change management plan:

1. Build a stakeholder analysis.

A stakeholder analysis identifies who will be affected by a change, how they'll be impacted, what they'll need to transition effectively, and how you should communicate with them. It's critical that you do this early in your change process (if not first) so you know who to consider when you build the rest of the change strategy for your implementation.

2. Build an OCM readiness assessment.

A readiness assessment shows how ready your organization is for the planned implementation. This assessment can reveal early indicators of the control issues, resource concerns, and the resistance that's likely to surface before, during, and after implementation. A lack of readiness often leads to a failed or stalled implementation.

3. Develop OCM impact analysis.

OCM impact analysis helps you determine global, group (function or work team), and individual impacts due to change. The analysis reviews all ServiceNow project work streams to identify issues that might lead to resistance so you can plan appropriate change actions—like those to your strategy, training, communications, new resources, etc.—to resolve issues proactively. Since an impact analysis depends on your understanding of the organization, complete the OCM readiness assessment and the stakeholder analysis before the OCM impact analysis.

4. Develop an OCM risk assessment.

The OCM risk assessment is your opportunity to evaluate all the impacts of your implementation and the potential risks they pose. When you surface these risks early, you can make better decisions when you schedule and plan committed resources.

Make sure you document what you learn as you perform these analyses. While you'll likely collect enough information to write white papers and fill spreadsheets, keep it simple at first—start by only completing a one-page analysis for each of them that includes:

- A brief summary of your findings (300 words maximum)

- A list of three to five of your most important stakeholder groups, readiness indicators, change impacts, and risks
- A 2x2 matrix chart that plots the urgency and importance of addressing your identified stakeholder groups, readiness indicators, change impacts, and risks to show you where to focus your OCM planning

Figure 4 shows a one-page example format that you can use to start documenting your findings. (This example is for a risk assessment.)



Figure 4: One-page format for documenting OCM risk assessment findings

Customer insights

ServiceNow customers share two insights that are critical as you research organizational change context.

INSIGHT 1:

Use your research as an opportunity to engage stakeholders and gain support for the change

It can be tempting to treat your analysis as something that's purely clinical and logical. But the outputs of your research and analysis aren't your only goals—what matters is the process of engaging stakeholders, empathizing with them, and learning how to better manage the organizational change.

Recognize that, even as you're simply researching, *you're already starting the change process*, and you can inadvertently create resistance or confusion if you don't engage and empathize

effectively. Take advantage of your learning and research as an opportunity to build understanding with stakeholders, especially when your analyses require in-person and/or group meetings.

Best practice – Involve as many stakeholders as is possible or reasonable when you conduct OCM research

Keep in mind that every engagement is an opportunity to build trust and help stakeholders feel comfortable with the organizational change. Even when you think you have enough information, look for opportunities to be as inclusive as possible in your research.

Most importantly, recognize that authority doesn't necessarily equal influence. Ensure you engage key *informal* influencers in the organization to understand their perspective as well because it's one that others will likely adopt.

“The more you can build buy-in with stakeholders early on, the more stakeholders will go along with you in the end.”

– Now Platform owner at a government organization

Best practice – Opt for as many in-person assessment opportunities as possible

In-person meetings are the most effective way to learn about your organizational change context (that is, your stakeholders, change readiness, risks, and impacts) *and* to engage stakeholders.

While you can learn a lot virtually (using surveys, for example), when you engage directly with stakeholders during your OCM analyses, you have an excellent opportunity to foster understanding and support, face to face. If you treat these analyses only as an information-gathering step, you'll miss an excellent opportunity to move your stakeholders toward commitment.

Best practice – Use OCM analyses as an opportunity to identify potential future ServiceNow champions and people who could best fill new roles

Your OCM analysis can identify who might be best positioned or skilled to drive ServiceNow goals during or after your implementation.

Don't do this overtly, but use your analyses as a rare chance to identify people who would make good future [ServiceNow champions](#) or who could fill other new roles you may need to manage and deliver ServiceNow capabilities.

“There are two potential benefits to OCM stakeholder analysis: One is to identify and learn about every potentially impacted stakeholder. The other is to identify stakeholders who might be best suited to help ServiceNow succeed longer term. You can almost think about it like searching for candidates for future roles. Doing this helped me quickly identify people that could fill newly defined ServiceNow process owner roles, for example.”

– **Now Platform owner at a Fortune 500 transportation and logistics company**

Best practice – Work with existing ServiceNow champions to get an initial understanding of the situation and drive engagement

Your champions are skilled in understanding what's going on with stakeholders—they're usually confident, influential, and “know where the bodies are buried.”

They understand nuances that are hard to identify through assessments and can often sense where resistance might come from. This is especially true if you've recruited your biggest resisters from past system implementation efforts onto your champion team, which is a good idea. Start working your champions early and ask them to use their experience and relationships to identify the stakeholders you most need to engage.

INSIGHT 2:

Repeat and revisit your OCM context assessments over time

Your context will change. When you treat your OCM assessments as a one-and-done activity, you risk working with outdated information to support your organizational change management plan. This is especially true at organizations that are growing or changing rapidly because it's more likely that your stakeholders and teams will change across any given project. To avoid this, periodically revisit and update your analyses.

Best practice – Connect with a small, representative group of stakeholders over time to update your OCM analyses

After you initially complete your OCM analyses, identify a subset of stakeholders that you can continue to learn from—think of this group as your “cabinet” that can both provide insight into your context as it changes and share feedback related to your plans. This makes it much easier and less burdensome to revisit your assessments over time.

What to do next

Now that you've researched your organizational context, it's time to craft and document plans for how you will manage the organizational change. Don't delay your planning process—try to start early enough to have draft plans ready for your project kickoff.

Be prepared to revisit your OCM assessments over time as well, especially if you lack any information you need to develop effective plans. Consider the triggers that should prompt a review of your OCM assessments, being careful to include any major changes in organizational structure or leadership.

Step 3 – Document organizational change plans

KEY INSIGHTS

- Balance top-down messaging with bottom-up listening.
- Treat OCM communication like a marketing campaign.

Your change management plan should be thorough and focus on how best to maintain and improve productivity as you transform workflows and work processes with ServiceNow. A good plan should consider how the design of your organizational and team structures might need to change, what training and enablement you need, how you plan to communicate changes to your stakeholders, and how to potentially mitigate the impacts of organizational change where possible.

To build your plan, complete these action steps:

1. Define your future-state organizational design.

ServiceNow implementation can result in the need to reconsider your current organizational design, especially if you're deploying multiple solutions. For example, the way you've set up your service desk and/or process teams may no longer fit the workflows you're implementing on the Now Platform®. Engage your HR team early to consider how the design of your organizational model, team structures, roles, and jobs might need to change as part of the deployment.

2. Plan stakeholder training and enablement.

The people in your organization will need help preparing for how ServiceNow changes the way they do work. To support this, make a plan for how and when to deliver the necessary training and enablement to specific people and roles based on what you learned in your stakeholder analysis.

3. Develop your communication plan.

Effective, targeted communication is critical to ensure your stakeholders aren't simply aware of the change but that they actively support and commit to the change. To do this well, you need to plan for what you need to communicate, which stakeholders need to know, and when they need to know it.

4. Assemble your OCM plan.

OCM is a major component in any ServiceNow deployment and is tightly integrated with your overall technical plan and roadmap. Make sure you incorporate your OCM research and plans into your overall ServiceNow program plan. Compile your findings into one easily shareable document that includes an executive summary of all of the plan elements you developed earlier (stakeholder analysis, impact analysis, risk assessment, etc.). Ideally, assemble the OCM plan before your kickoff—but remember that you can make modifications and additions after that.

Customer insights

ServiceNow customers have shared two insights that are critical as you document your change plans.

INSIGHT 1:

Balance top-down messaging with bottom-up listening

Organizational change and adoption is won or lost at the grass roots—among stakeholders who are *not* in leadership positions, who will (or won't) accept and champion change among their peers. But organizations often frame communications, training, and other elements of the OCM plan as top-down.

No matter how well intentioned, a plan that is oriented around leadership (such as communications from the executive sponsor) can risk making front-line teams feel like something is happening to them that they have no control over—rather than feeling like they're a part of something interesting and that has great potential. This is an easy way to reduce stakeholders' commitment and support, and it should be avoided.

Best practice – Create a safe space for stakeholders to voice their concerns

Open and honest communication with front-line teams can be key to building trust and helping stakeholders feel comfortable with the change. Leaders hold plenty of meetings to have their say, so it's important to balance this with opportunities for others in the organization to speak up and take part in navigating the organizational change.

This can happen in one-on-one meetings or in focus groups. Set ground rules for these conversations that both help people feel comfortable speaking honestly and that keep the meetings productive and don't simply become forums for fear and complaining. To inspire action, pair these meetings with exercises where each participant develops an action plan for how they will prepare for the change after the session.

Keep in mind that these meetings are a good opportunity to learn about what part of the change most concerns your stakeholders. Discuss these concerns and co-create plans to address them during the meetings to help your stakeholders feel more involved and comfortable with the change process. When relevant, share your OCM plans during these conversations and seek feedback that you can use to improve them.

Best practice – Identify where line-level managers can be champions for your change

The “pocket veto”—resistance in the form of inaction—can be especially dangerous because it's difficult to detect, and it results in roadblocks that can be as challenging as more explicit resistance.

This can be especially challenging among line-level managers. They are among the most critical levers of change in the organization because they work at the interface between managers and individual contributors.

Avoid pocket veto resistance by identifying line-level managers who can help you champion the organizational change with their peers and directly reach a greater number of people in your organization. These champions can provide their insider perspective across both managers

and individual contributors in your organization to identify where holdouts exist and to help you bring them on board.

INSIGHT 1:

Treat OCM communication like a marketing campaign

Communication is the most important part of OCM to get right. Many teams make the mistake of not using their communication opportunities as a chance to convey a targeted, well thought out message to the right audience(s) to inspire their support and commitment. Instead, organizations often resort to blasting emails to the whole company, many of which are usually ignored.

We recently spoke with a customer at a large insurance company who shared a great perspective on how to make sure this doesn't happen: Treat OCM communication like a marketing team would treat a marketing campaign. This effectively means that you need to:

- **Think critically about your core messages to make sure you succinctly convey the right information** – Marketing conversations are tuned to be interesting, memorable, and—increasingly—to teach their audience something that makes them want to learn more. You can do the same with your communications.
- **Be careful of the tone you use when articulating your messaging** – In some respects, you're selling your vision for ServiceNow and transformation and trying to make sure stakeholders are informed and excited about the future. But you can't come across as deaf to the potential anxieties and concerns throughout your organization.
- **Define your audiences** – Know exactly who you're reaching out to and consider how your messaging should differ for different audiences. You need to understand how the “what's in it for me” factor changes across audiences. How will the business outcome that matters to the C-suite executives translate to the individual service desk agent or customer service rep?
- **Set a timeline for your communications** – Start communication as early as possible. One customer recommends starting the quarter before your project starts, when possible, and to try and communicate with your executive leadership even earlier.
- **Set the right cadence for communications** – The pace of messaging is important. Repetition can help your stakeholders see and internalize your messages, but daily contact can be annoying.
- **Experiment with different channels for communications** – There are many different channels to consider for communications, including targeted emails, lunch and learns, in-person demos, newsletters, articles, videos, etc. You'll usually have a better chance of reaching your intended audience if you can use a few different channels that are matched to your organization's context and learning preferences.

Use a template like the one in Figure 5 to jump-start developing a structured communication plan that considers the points above.

Audience What different groups do we need to communicate to?	Audience background What should we know about this audience when articulating messaging?	Communication objectives What do we need to accomplish in communications with this audience?	Communications channels What channels should we use when communicating with this audience?	Timeline and cadence When do we communicate with this new audience? How frequently?	Responsibility Who is responsible for leading communications with this audience?

Figure 5: OCM communication planning template

Best practice – Use data to support your communications

Messaging that's rooted in hard numbers is more credible and can, in metrics-driven organizations, drive more excitement.

For example, a ServiceNow platform manager at an S&P 500 healthcare company shared that he maintains dashboards that publicly track metrics on ServiceNow successes and platform adoption to promote the benefits of committing to ServiceNow. He explained that he uses these metrics in his communications to demonstrate the benefits of ServiceNow and compares results across different business groups to exert light social pressure on adoption laggards.

What to do next

You should have clearly documented plans for managing organizational change before kick-off. Next, make sure that your OCM planning is used effectively to help the people in your organization adapt and keep pace with your technical deployment. Stick to your timelines and aspire to meet your OCM goals before your ServiceNow pilot and go-live.

Remember that your OCM plans are living documents—you can modify, update, and improve them at any time as long as your changes will help you meet your goals on time.

Step 4 – Execute the organizational change

KEY INSIGHT

- Design pilots from a people perspective.

Your OCM planning only supports successful organizational changes if it's enacted effectively. To put your documented OCM plans into action, complete these action steps:

1. Use your OCM plan.

Put your OCM plans—particularly your OCM communication plans—into action in advance of your ServiceNow pilot and go-live. To do this, vet your OCM plan with your executive sponsor and senior leaders, share a summary of your plan (without sensitive information) widely, and launch any planned OCM efforts that aren't already underway.

2. Plan pilots and go live.

Use the pilot of your ServiceNow solution as an opportunity to find out how prepared your stakeholders are for the incoming change in addition to how well the technology itself works. Invest in designing a comprehensive pilot and remember to take notes during the pilot so you can identify if anything else needs to happen (like additional training, enablement, communication, etc.) before and shortly after your go-live date.

Customer insights

ServiceNow customers identify two insights that are critical as you execute organizational change.

INSIGHT 1:

Design pilots from a people perspective

Pilots are understandably focused on testing how well a technology or process works before deploying it. But pilots don't need to focus *exclusively* on testing the technology and process itself—they can also be used to ensure that the *people* in the organization are ready for the go-live. Pilots are an excellent opportunity to truly show the people in your organization how work will change and to help them become accustomed to it. It can also feel empowering to participate in a pilot because participants have the chance to contribute to development and become part of the project.

Best practice – Invest in expanding pilot groups

This helps you identify potential issues with the solution and also provides an opportunity for more people to experience working with ServiceNow ahead of time. And it can help stakeholders feel more comfortable with the change before it directly impacts their day-to-day work.

Make sure to include different types of stakeholders, too. If your expanded pilot group still centers around technologists or people already familiar with the process, you could miss out on helping less tech savvy or less informed stakeholders prepare for the launch (and miss valuable feedback on how easy your new solution is to use).

It's also best to involve your most outspoken stakeholders in the pilot. Their involvement will be valuable regardless of their initial opinion of the new solution. If they liked it, they'll talk about how great it is and convince others to follow suit. If they found issues, they'll make sure you know in time to fix them.

INSIGHT 2:

Use go-live celebrations to solidify OCM efforts

We find that many teams don't take enough advantage of their go-live as an opportunity to connect with stakeholders, celebrate their transition, and further demonstrate the value of them buying in.

As a fun tradition, ServiceNow usually provides a cake for go-live celebrations. But there's more potential to this celebration than a quick break in the office café—it's a great opportunity to celebrate wins as you execute change and to help create a climate where people in your organization feel like they've contributed toward a larger goal.

To get the most out of your celebration and solidify your OCM efforts:

- Invite everyone (within reason, but especially including all OCM stakeholders)
- Have a theme for the celebration and create flyers and posters to feature what you accomplished
- Have the ServiceNow executive sponsor attend and address the audience with goals, accomplishments, and information on what's next
- Publicly recognize people who were early users during the go-live celebration, like the first person to close a case, the 100th person to request something, etc.

What to do next

OCM doesn't stop at go-live. After deployment, it's important to continuously assess whether or not you're meeting your OCM goals. ServiceNow adoption rates provide evidence of your success and should be high if your OCM effort were successful (assuming the solution itself was designed and implemented well).

Now it's time to plan how you'll maintain and improve your OCM approach to support successful deployments in the future. As a first step, make sure you keep your OCM roles together.

Step 5 – Enable an ongoing OCM function

KEY INSIGHT

- Develop ServiceNow OCM as a capability that can consistently manage future organizational change projects.

Effective OCM is an ongoing effort. ServiceNow customers who realize the strategic value of the Now Platform plan to upgrade at least once each year—and that drives continuous change, so their OCM capabilities need to grow with the ServiceNow program.

To make sure your OCM capabilities grow with each upgrade, complete these action steps:

1. Use evaluations to determine how effective the overall OCM program is and to identify where to make future improvements.

It can be very insightful to get feedback and information after your go-live. It gives you the chance to explore how beneficial your OCM efforts were and to find ways to improve how you deliver OCM in the future.

2. Maintain your OCM program team and update the OCM documents over time.

Aspirations to deliver strategic value with ServiceNow and keep up with biannual upgrades will drive continuous change. Make sure your OCM capabilities grow with your ServiceNow program.

Customer insights

ServiceNow customers identify two insights that are critical as you build a standing OCM function.

INSIGHT 1:

Apply continuous improvement practices to your OCM capability

After your initial go-live, keep your OCM team together and continue to involve your OCM roles and stakeholders in improving how your organization will manage organizational change in the future. Make sure that your OCM efforts are codified as a defined *process* with clearly defined steps and workflows rather than as a one-time *project*.

While your future OCM needs may be smaller than during your initial deployment, try to execute a repeatable OCM process for each change. This ensures that organizational changes are managed more efficiently, and it gives your organization opportunities to continually improve its OCM readiness through repeated practice.

Best practice – Use post-mortems to improve your OCM process and resources during the time between ServiceNow upgrades

You can expect to benefit from your OCM capabilities every time you support a ServiceNow upgrade or expansion. After every implementation or upgrade, conduct a post-mortem of your OCM efforts to identify opportunities to improve your planning and execution efforts, as well as the skills of your team.

As with any process, consider building a runbook for OCM that captures your lessons learned and your process improvement recommendations.

Some customers we've spoken with actually use their OCM roles and processes to support other, non-ServiceNow organizational change needs when there isn't an active ServiceNow change happening. This provides them with additional opportunities to improve their OCM capability and builds good will and credibility for their team.

“Our most successful customers are the ones who have an OCM reinforcement program. It's not just about going live; it's about that reinforcement and applying and getting better at OCM over time.”

– Jason Rosenfeld, VP at Cask

INSIGHT 2:

Explore how your ServiceNow OCM capability can support your broader vision for enterprise transformation

Your OCM program can do a lot more than support upgrades and ServiceNow expansions—it changes how work gets done across your entire organization through enterprise service management (ESM) from ServiceNow to meet digital transformation goals. Your OCM program team can provide invaluable experience and expertise to a larger, enterprisewide center of excellence initiative for digital transformation.

When your team members combine what they know about how ServiceNow can transform work with their experience managing the *people* side of the transformation, they can go beyond helping with other OCM initiatives (even those not involving ServiceNow) to informing your training strategy, communications, and pilots for new digital business services.

What to do next

Allocate budget to enable an always-on OCM function. Keep in mind that good OCM is a competitive advantage that helps drive organizationwide transformation and invest in maintaining and improving your OCM capability over time.

The takeaway

Well-executed OCM is a critical component of every ServiceNow deployment, because it ensures that the people in your organization are ready to deliver value using ServiceNow. While it's difficult in some organizations to recognize the value of OCM early enough, it's always worth investing in getting it right.

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

Good – OCM is treated like a *project* with a start and finish to support specific ServiceNow implementations.

Better – OCM is considered a part of every ServiceNow implementation, upgrade, or expansion project.

Best – OCM is treated like a *program* or *capability* that is central to how ServiceNow is managed, and it expands to support organizationwide transformation.

What should I convey to my team?

It's as important to get OCM right as it is to successfully implement ServiceNow itself. If our people aren't willing and able to use ServiceNow once it's deployed, we won't realize our vision for transformation.

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)

To determine if you're managing organizational change effectively, measure the following top KPIs:

- *% response rate for OCM assessment surveys and/or # of stakeholder participants in OCM-related meetings* – Tracking stakeholder participation in ongoing OCM efforts (that is, their replies to your surveys or participation in your meetings) provides insight into how much of your audience you've engaged. Ideally, you should engage all or most of the stakeholders impacted by organizational change.
- *# of ServiceNow champions* – This indicator provides a proxy measurement for stakeholder support and buy-in. Increasing the number of people championing ServiceNow should increase the likelihood that the organization as a whole will follow suit.
- *# of unique users migrated to Now Platform* – This is a key indicator to track after your go-live and provides insight into the value the OCM efforts you delivered. The number of ServiceNow users should increase more rapidly when OCM is done well.

Stakeholder management

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

<p>Responsible/accountable stakeholders</p> <ul style="list-style-type: none"> • Now Platform governance lead • Now Platform owner • ServiceNow OCM program team 	<p>Consulted/informed stakeholders</p> <ul style="list-style-type: none"> • CIO • Business leadership • Service owners • ServiceNow governance boards • Business stakeholders (informed only) • Vendor representatives (informed only) • Business engagement teams • Partners
<p>Key communications</p> <ul style="list-style-type: none"> • Define the roles and responsibilities. • Communicate decision-making processes and escalation paths. 	<p>Key communications</p> <ul style="list-style-type: none"> • Provide updates on stakeholders and impact analyses. • Vet the communications plan. • Provide updates on messaging feedback and effectiveness.

Related resources

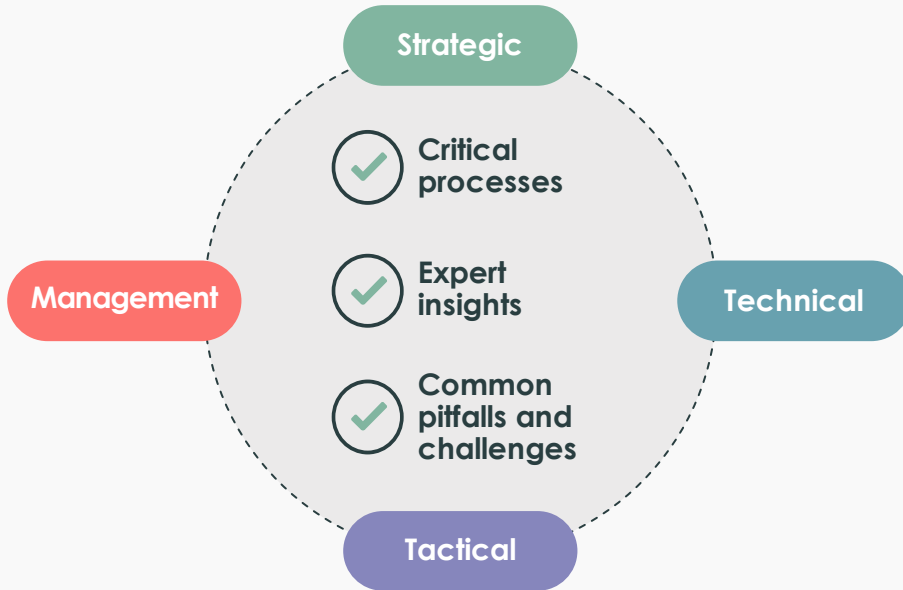
- [Success Checklist – Create an organizational change management plan](#)
- [Success Quick Answer – How to build an OCM communication plan](#)
- [Success Quick Answer – How can I assess if my organization is ready for ServiceNow?](#)
- [Success Quick Answer – How do I start organizational change management?](#)

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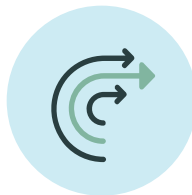


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