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The essentials for implementation success with ServiceNow

Document last updated in Q1 2020—see the new <u>Implementation essentials Workbook</u> for the latest content.

What's in this Success Playbook

ServiceNow® implementations fundamentally change how people work, and that means implementations need careful oversight and management. This Success Playbook identifies the most essential elements of a successful implementation—one that brings you the most value.

Key takeaways

The most important things to know

Successful implementations are supported by a well-defined management program that defines clear business objectives, governance rules, and includes resources for training and organizational change management.

The payoff of getting this right

Customer experience shows that well-managed implementations are transformational, save money, and reduce time to to the highest value realization.

Ask yourself these questions to ensure a successful implementation of the Now Platform

1. Do we have clear, explicit, and documented business goals for our ServiceNow implementation?

It's easy for implementation to get bogged down in all of the project requirements associated with system and data migration, organizational change, and training. But implementations without a clear statement of business goals—whether in terms of improving employee experience, reducing service outages, increasing speed of delivery, or something else—are often challenging, because they lack a North Star that helps decision makers prioritize activities and resolve competing interests.

What to do

Work with your executive sponsor (ideally, either a C-level executive or someone who can reflect the C-level "voice") to define, document, and communicate a limited set of measureable business goals that everyone in the organization can understand.

2. Do we have consistent engagement with an executive sponsor for the implementation?

Project and/or executive sponsors can be difficult to engage, given the number of priorities on their calendars. Yet without consistent engagement and regular reviews with the project team, it's difficult to ensure that resources are made available to address business priorities that change during implementation or risks that may surface. Often, sponsorship is less about the amount of time the sponsor spends on the project and much more about the consistency of their involvement. A key metric that organizations should track is the percentage of implementation-related meetings the sponsor attends—if the number is dropping, it could be sign of declining engagement.

What to do

Define a regular cadence for engagement with your executive sponsor, and follow a structured agenda that captures:

- Progress and anticipated obstacles that may require additional resourcing

- Any change to business priorities that may affect implementation

- Early warning signs or risks that could affect implementation

- Key messages and measures of progress that should be communicated to other executives

3. Have we defined a phased approach to implementation with an early emphasis on incremental wins?

"Big bang" approaches to implementation can be problematic due to their complexity. For most organizations, it's simply too much process change and training all at once, which limits effective adoption. Leading organizations <u>define a phased or iterative rollout of functionality</u> that's focused on three things:

- Ensuring the functionality they roll out respects end users' and service fulfillers' (such as service desk agents) capacity to absorb it

- Identifying and capturing lessons learned at each phase of the rollout so they can improve subsequent phases

- Capturing incremental wins that can drive adoption momentum among key populations

What to do

Divide your implementation phases into the most feasible incremental wins based on:

- Your overall value realization

- Your organization's change capacity

- The lessons you can potentially learn at each phase

Refer to our Success Playbook on <u>how to realize and manage value from your ServiceNow investments</u> for additional details.

4. Have we explicitly committed to managing to out-of-the-box functionality?

It can be tempting to customize functionality, especially as you roll your implementation out across different business units and geographies. While there may be some legitimate requirements for customization (for example, to support compliance), excessive customization can create downstream maintenance costs, increase the testing time required for upgrades, and delay implementation. Implementation—not post implementation—is when you need to set an explicit organizational commitment to making out-of-the-box (OOTB) functionality your standard and to customize only when there is legitimate business need that you've validated at the executive level.

What to do

Before implementation begins, work with your executive sponsor to:

- Communicate the importance of sticking to OOTB functionality across different business lines and geographies.

- Define the explicit criteria you must meet for customization to be approved and implemented.

- Vest the executive sponsor with approval authority for all customizations.

Refer to our Success Playook on how to <u>avoid customization pitfalls so you can innovate and meet demand at scale</u> for additional guidance.

5. Have we explicitly defined and documented governance rules such as decision authority for the implementation?

Your ServiceNow implementation will involve a diverse group of stakeholders including C-level executives funding the process, service owners, and the technical staff responsible for integration and support. It can be easy to lose sight of responsibilities and authorities across these stakeholders, which potentially slows down key decisions as implementation moves forward. The start of implementation should come with clear rules for the road. Create a defined decision model that explicitly identifies who approves different categories of decisions and who is required to be informed or consulted about these decisions.

What to do

Define a responsibility assignment matrix (like a RACI or OARP) and escalation path for

1. Strategic decisions, like those related to budget approvals or team resourcing

2. Business decisions related to implementation, like process configuration and demand management

3. Technical decisions, like those related to integration or security protocols

Here are some examples of key decisions you need to make in your implmentation:

- Priority of business outcomes decisions

- Priority of projects, enhancements decisions

- Program/project budget and timeline decisions

- Administration and operations (BAU) decisions

- Go live quality, Go live readiness decisions

- Dispositioning demand, backlog, changes decisions

- Solution organization, functional, service/process, and data architechture decisions

- Solution security model decisions

- Solution rollout schedule and upgrade decisions

- Training and communication decisions

- Acceptance (outcomes and solution) criteria decisions

If governance is new or not strong within your organization, make sure that the partner you're engaging has solid governance experience.

Refer to our Success Playbook on how to build a dedicated, dynamic governance process, policies, and team for additional guidance.

6. Are we engaging certified and experienced partners to help lead the implementation?

Initial implementations should take advantage of the experience of consultants who are familiar with implementation pitfalls and best practices. This limits your organization's overall project risk and can save time and effort for internal staff who may be required to carry out their "day jobs" in addition to supporting implementation.

What to do

Identify partners with certification in the specific ServiceNow product lines you're implementing. Review partners and consultants for a consistent, successful track record of experience (and references) with organizations similar to yours in size and industry.

Refer to our Success Playbook on how to find, manage, and coordinate capable, certified partners Success Playbook for additional guidance.

7. Do we have comprehensive training plans in place for technical staff and end users?

Training is often subject to "benign neglect" in implementation. Sometimes it happens at the end of the project, and sometimes training is delivered lightly and generically rather than comprehensively. But solid technical implementations with inadequate training are a recipe for slow adoption—and a slower path to realizing value. Leading organizations pull training forward and ensure their training plans reflect:

- The specific needs of different populations – These might reflect differences across geographic regions or roles, for example, between service desk agents and process owners.

- The needs of end users, not just technical staff – Many organizations often underestimate the training they should make available to end users, whether they're front-line staff or business leaders.

- Certification needs across key technical and fulfiller roles – Many organizations underestimate the role that certification can play in ensuring that critical staff are up-to-date on ServiceNow capabilities and how to best operationalize them.

What to do

Document comprehensive, specific training requirements across technical staff and end-user groups as you plan your implementation. As you identify these requirements, estimate the level of investment you need to support comprehensive training and certification. Then make sure to communicate this to your executive sponsor and reflect it in your overall implementation budget.

Refer to our Success Playbook on building an internal team of ServiceNow experts and training users for additional guidance.

8. Do we have a comprehensive plan for organizational change management?

Your ServiceNow implementation will change how people work for the better—but even positive change can meet with confusion, inertia, and resistance, which will delay adoption as well as seeing value from your implementation. Instead, accompany your implementation with specific organizational change management plans that aren't generic or purely focused on top-down messaging. Leading organizations ensure that organizational change management provides the resources for teams to make themselves confident co-creators and champions for change.

What to do

Ensure that your plan and budget includes time and support for the teams most affected by the change to play a role in cocreating the change, whether in terms of workshops that elicit their voice in process change or through other mechanisms that address their most critical points of concern. Then invest in demonstration and training activities that make teams confident they can navigate ServiceNow and provide key peer influencers with the materials that allow them to effectively champion change across the organization.

Refer to our resources on OCM planning to get started.

9. Have we defined metrics to track and report performance against?

Every implementation should have a few clearly defined metrics that can be used to demonstrate progress against the business outcomes expected from the implementation. These metrics metrics are not just helpful in performance management but are critical in making timely course correction decisions for implementation success.

What to do

Select two to three metrics that you can use as measures of success for your implementation. We recommend using Performance Analytics to track and report them. Make sure the metrics you select are:

- SMART – Specific, measurable, actionable, relevant, and time bound

- Aligned with the business objectives of the implementation

- Consistently defined and measured across teams

Refer to our Success Playook on <u>baselining and tracking performance, usage KPIs, and metrics</u> for additional guidance.

For more information, see our best practice rearch on the <u>ServiceNow Customer Success Center</u> or contact your account executive.
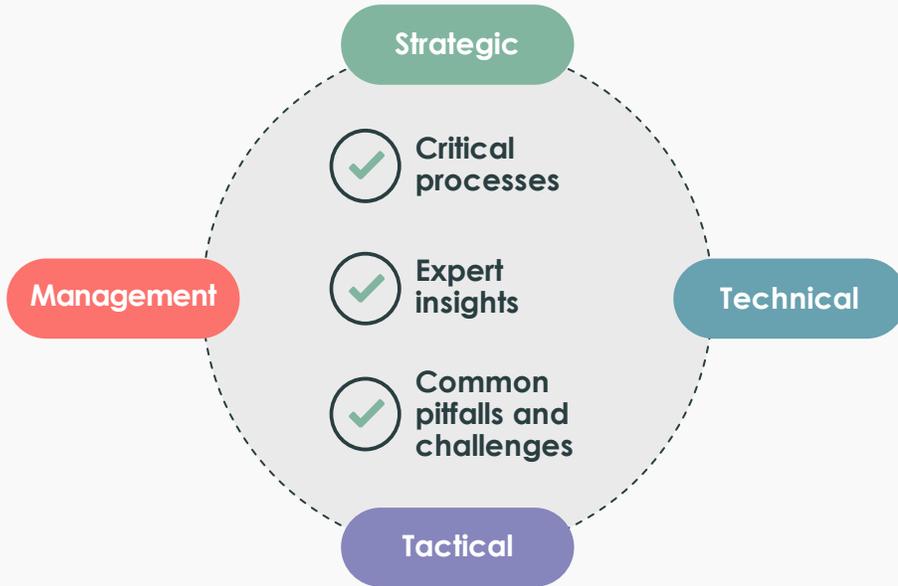
If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at <u>best.practices@servicenow.com</u>.

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