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Build an internal team of ServiceNow experts and train users

What's in this Success Playbook

Get ready to learn the effective methods for building ServiceNow® and service management expertise at your organization. This playbook will help you manage ServiceNow as a program of action and transformation, and it'll help you:

- Determine the team of experts you need to support the Now Platform® and the training required to build this team's ServiceNow expertise

- Identify what you need to know to train process users and the broader organization of users

- Understand the need for career development and learning as ongoing activities

The most important things to know

Don't make training and skill development a one-off activity. It should do more than meet your initial implementation requirements. Make training and skill development for your ServiceNow team, process users, and customer base an ongoing process, and build a comprehensive set of skills and knowledge to get your users on board with using the platform.

The payoff of getting this right

- Effective training gives your ServiceNow platform team the expertise to teach others how to make the best use of ServiceNow capabilities.

- When you train your process users effectively, you'll meet your adoption targets faster and be well on your way to achieving your business objectives.

What you need to get started
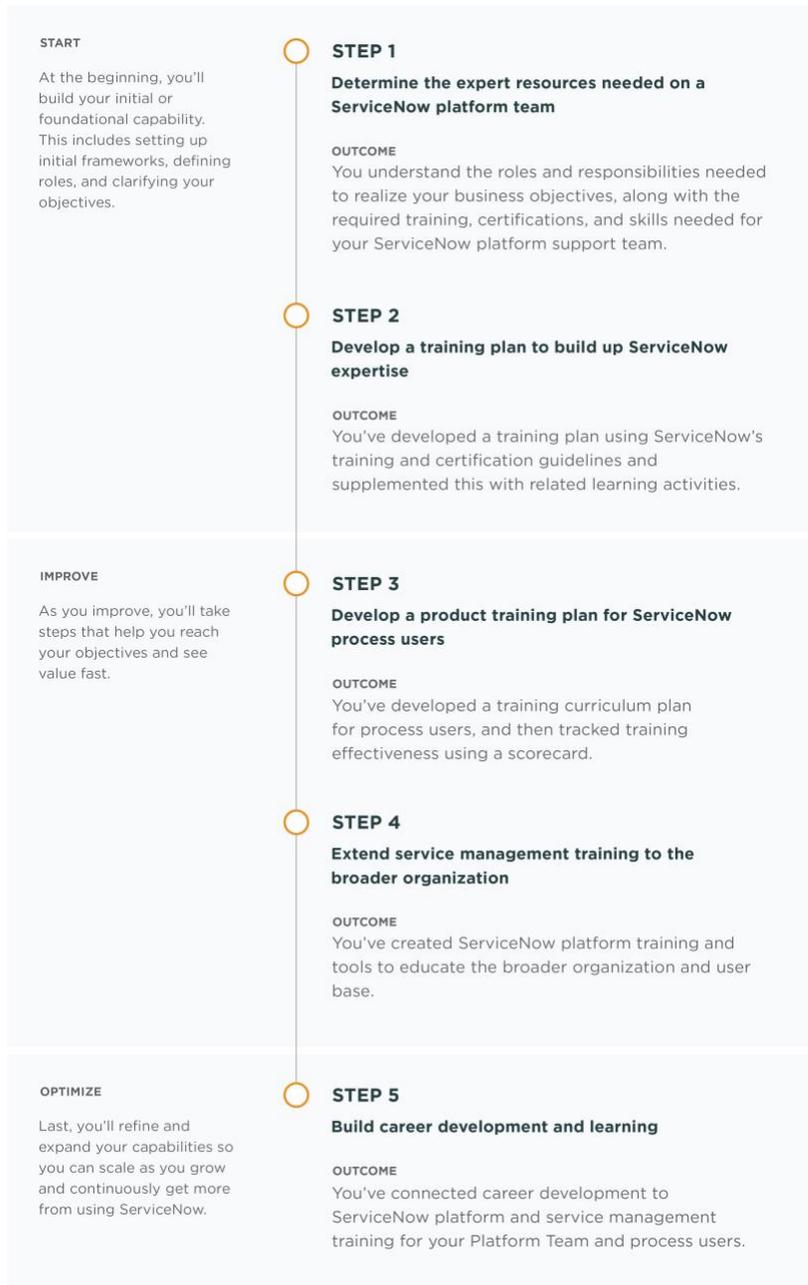
Prerequisites

You need an awareness of the ServiceNow products your organization plans to implement, a commitment from your company's leadership to build a trained team, and defined business outcomes and roadmap.

When you should start this activity

Start planning how you'll resource and train your ServiceNow platform team before you start your ServiceNow implementation. This way, your team is developing the skills and knowledge it needs to be effective as you go live and into the future.

Playbook overview

Follow these steps to create and build an internal team of ServiceNow experts and train your users.

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

Determine the expert resources needed on a ServiceNow platform team

OUTCOME
You understand the roles and responsibilities needed to realize your business objectives, along with the required training, certifications, and skills needed for your ServiceNow platform support team.

STEP 2

Develop a training plan to build up ServiceNow expertise

OUTCOME
You've developed a training plan using ServiceNow's training and certification guidelines and supplemented this with related learning activities.

IMPROVE

As you improve, you'll take steps that help you reach your objectives and see value fast.

STEP 3

Develop a product training plan for ServiceNow process users

OUTCOME
You've developed a training curriculum plan for process users, and then tracked training effectiveness using a scorecard.

STEP 4

Extend service management training to the broader organization

OUTCOME
You've created ServiceNow platform training and tools to educate the broader organization and user base.

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

Build career development and learning

OUTCOME
You've connected career development to ServiceNow platform and service management training for your Platform Team and process users.

If you're not familiar with the staffing you need to support ServiceNow, start with Step 1.

If you've already trained your platform team, process users, and regular users, but you're looking for guidance on how to enhance your training, you may want to start with Step 5.

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Step 1 – Determine the expert resources needed on a ServiceNow platform team

- When you create your ServiceNow platform team, consider what you need to support your business outcomes.
- Include business skills in your training and development plan so your platform teams can more thoroughly support your ServiceNow transformation.

Your ServiceNow platform team will be there to support your ServiceNow implementation as well as its management. This team will also establish, maintain, and extend ServiceNow as a strategic business platform to the rest of your organization, so it's critical that you create the right team.

Start your ServiceNow implementation by assessing and identifying the expert roles you need on this team. To do this, complete these action steps:

1. **Learn what roles and knowledge you need on the ServiceNow platform team**.

   The ServiceNow platform team will be responsible for design, support, configuration, training, and maintenance of ServiceNow, so you need to find out what knowledge it will need in order to deliver those responsibilities. As you do this, also:

   – Use your implementation roadmap to find out how resources will be allocated to this team.

   – Include a training function within the platform team or within your learning and development department that focuses on service management and Now Platform training.

   – Refer to ServiceNow's Success Insight: Platform team roles and responsibiltiies

2. **Research ServiceNow technical product training courses and certification options.**

   Build the team's ServiceNow and service delivery expertise with options that include:

   – ITIL training and certifications for IT service management and IT operations management

   – SHRM training for HR

   – Multiple training and certification paths

- Informal learning opportunities, like industry and ServiceNow events, including our Knowledge conference and Now Forum/Summit

After you've reviewed the training options, estimate the costs and benefits and work with your executive sponsor to secure budget approval.

3. **Assemble a list of critical and supplemental skills for your ServiceNow platform team.**

To help deliver your business objectives and transformation vision, the platform team needs to learn and develop these skills:

- Technical

- Service management

- Operational skills

- "Soft" skills, including collaboration, negotiation, and influencing others

Customer insights

Customer experience points to two insights you should keep in mind as you determine the resources you need for your team.

INSIGHT 1:
Start with your vision for transformation and desired business outcomes

Organizations implementing ServiceNow may make the mistake of assigning resources to support it without truly understanding the vision and outcomes they need to deliver—or how it affects resource allocation. The most common mistakes are:

- Making implementation support an additional, back-burner responsibility for IT staff

- Reassigning people who previously supported a legacy platform without considering the responsibilities, skills, and experience they'll need to deliver business outcomes using ServiceNow

Best practice – Build the best possible platform team

When you build your platform team, consider what you'll need to support your vision and desired business outcomes from ServiceNow, including the scope of your initial implementation, product roadmap, requirements for technical governance, and partner model. Answer the following questions to help assess your requirements for your platform team:

- How big is the scope of your initial implementation? Consider the footprint of change you'll introduce to your organization—will you use a "big bang" approach, or will you segment the training by departments, locations, or groups?

- What products (ITOM, CSM, HR, etc.) are you initially implementing? What experience do you need to support these products?

- Does your product roadmap focus primarily on out-of-the-box (OOTB) solutions, or does it include custom applications?

- What's your partner model for your initial implementation and its ongoing support? Will your partner perform most of the implementation or only guide your team? Will your partner provide any Tier 1 or Tier 2 support for your organization?

EXPERT TIP

Use the ServiceNow platform team sizing modeler to anticipate and model the support team's needs as they relate to using the Now Platform. You can customize their calculator for your own organization based on the applications you're using, your number of process users, and other variables.

INSIGHT 2:

Balance technical and business skill

When you're training and developing a technically focused team it's easy to overemphasize the "hard" (or technical) skills and leave the "soft" skills behind, like communication, collaboration, and so on. Don't let this happen!

If your team members become product experts with ServiceNow but struggle with the skills they need to help others adopt the platform, they won't be able to help you reach your outcomes. And, without soft skills, they may have difficulty forming relationships with key stakeholders, like process owners and business leaders.

Help the team develop these skills before they're problems so they can effectively support organizational change management (OCM) as well as show the understanding and empathy needed to build great experiences on ServiceNow. (For more on this, see our Success Playbook on building organizational support for enterprise service transformation.)

Best practice – Include HR in your training plan

When you're thinking about training on soft skills, start with your HR department to see what tools they already have in place for skills tracking, or work with HR to customize the skills

assessment worksheet below as necessary. Then use it to assess your team and identify a plan to resolve any skill gaps they may have.

Skills assessment worksheet

1. What skills have you already acquired and feel competent doing?

2. What skills do you enjoy, even if you're not proficient at them?

3. What skills would you like to learn, acquire, or develop further?

Skills	Feel competent	Enjoy / favorites	Would like to develop
Communication:			
Verbal			
Body language			
Writing			
Presentation			
Influencing:			
Facilitation			
Selling			
Negotiation			
Motivating			
Collaborating			
Persuasion			
Inspiring			

Interpersonal:			
Networking			
Dealing with difficult people			
Conflict resolution			
Personal branding			
Leadership:			
Team building			
Strategic planning			
Mentoring			
Coaching			
Managing			
Diplomacy			
Dispute resolution			

Table 1: Skills assessment worksheet

What to do next

Now that you understand the roles to involve and their responsibilities, the training and certification options, and the skills your ServiceNow platform team needs to develop, you're well prepared to develop a training plan to build the expertise you need to support and expand ServiceNow.

Don't forget to formally document your role descriptions and skill requirements as part of your governance process. Also, create a charter for the platform team that's approved by your executive sponsor.

Finally, revisit the team's composition as you expand your ServiceNow capabilities. For example, you may need additional ServiceNow developers if your product roadmap calls for more custom applications, or you may need additional, targeted support in areas like HR or CSM.

Step 2 – Develop a training plan to build up ServiceNow expertise

KEY INSIGHTS

- Train your ServiceNow platform team before you start implementation so you can be sure you use ServiceNow effectively.

- Use the ServiceNow training and certification guide to identify training paths and certification opportunities for each role on your platform team.

Once you define the roles and responsibilities for your ServiceNow platform team, develop a training plan to build the team's ServiceNow expertise. To do this, complete these action steps:

1. **Document the training requirements for your ServiceNow platform team by role.**

   Try doing this with a matrix of training requirements by role to help you build your team's training plans.

2. **Create training plans for each member of the ServiceNow platform team.**

   Perform a training needs assessment to help you determine where expertise gaps exist for each role. Then, after the assessment, you can work with each team member to address these gaps.

3. **Work with your implementation partner.**

   Tap into your partner's product knowledge and previous implementation experience to supplement your training plans and identify learning opportunities for your team.

Customer insights

Our successful customers say you should keep the following these things in mind as you develop a training plan for your ServiceNow platform team.

INSIGHT 1:
Train your platform team when you start implementation

Many organizations pull existing IT staff in to support the Now Platform—and give them minimal or no training. But you can't assume that experience in technology translates directly to ServiceNow expertise. Without training that's specific to ServiceNow and your business objectives, the platform team may be tempted to "force fit" their prior experience into ServiceNow.

Best practice – Train the platform team close to kickoff

Train your platform team within 30 days of your implementation kickoff to make sure they can effectively use ServiceNow. Include relevant process owners in the training you deliver to your platform team. Their process expertise will be critical to your success—and they need to understand the new solution.

EXPERT TIP

Build knowledge transfer (KT) requirements into your partner SOW. Often partners will tend to do the work without explaining it fully to the platform team. Making the KT a formal SOW requirement and spelling out how that should happen (on-site) is a key factor in educating your team.

INSIGHT 2:

Use ServiceNow learning paths

Your platform team likely already has skills and knowledge they've derived from using legacy systems. But don't think this means they don't need any training at all—and you can't get away with building a generic, under resourced training plan, either. Your training needs to be tailored, because one-size-fits-all training won't address the individual needs your platform team will have. Tailored training:

- Equips your team with what they need to meet your organization's business objectives
- Directly addresses team members' specific, role-related skill gaps
- Teaches your team the known best practices for optimizing ServiceNow

Best practice – Use ServiceNow training resources

To prepare your ServiceNow platform team, use the ServiceNow training and certification guide to identify learning paths and certification opportunities for each role on your platform team. To book training and find more information, review the ServiceNow Training and Certification page, the additional ServiceNow learning opportunities listed below, and review Figure 1 to understand the ServiceNow Technical Training and Certification Model.

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Additional ServiceNow learning opportunities

Take a look at these additional ways your platform team can learn about ServiceNow:

- **ServiceNow Custom Training and Adoption** – A key measure of a successful implementation is the seamless adoption of new processes and supporting technology. That's why it's so important for your team to be aligned and working toward the same goal with your ServiceNow implementation. ServiceNow is here with custom training to help you prepare your business and users for the upcoming implementation, accelerate your user adoption, remove barriers, and pave the way for your success.

- **Knowledge conference –** Choose from hundreds of customer-led sessions and hands-on labs. You can also use the conference as a networking opportunity to meet with other customers and partners.

- **CreatorCon –** CreatorCon is a developers' conference within the Knowledge conference. At CreatorCon, developers compete for prizes by creating applications on the Now Platform.

- **NowForum/NowSummit conferences –** You can learn a great deal from these customized learning tracks and networking opportunities with ServiceNow customers and partners.

- **ServiceNow Community** – Explore and contribute to the many ServiceNow Community forums.

- **SNUGs** (ServiceNow User Groups) – Community members around the world have formed these online groups to discuss, ask questions, and blog about ServiceNow technologies. There are also regional events where users groups meet, share, network, and learn more about ServiceNow.

- **ServiceNow Product Documentation –** Here you can read all the latest product documentation for the Now Platform and ServiceNow applications.

- **ServiceNow Developer Program –** The ServiceNow Developer Program provides developers with resources to learn, build, and deploy applications on the Now Platform, and offers resources to help you have a successful application-building experience.

- **Customer Success Center** – Find resources to help you on every step of your ServiceNow implementation.

- **Now Creators** – Build and track skills and achievements with ServiceNow, with sharable profiles that display their accomplishments and track their progress in predefined training plans. **ServiceNow on-demand webinars** – Watch previously recorded webinars you're interested in any time you like.

- **ServiceNow events –** This calendar of all upcoming ServiceNow events includes product demos and seminars.

- **ServiceNow YouTube channel –** The ServiceNow YouTube channel includes many product and release videos you can learn from.

Technical Training and Certification Model
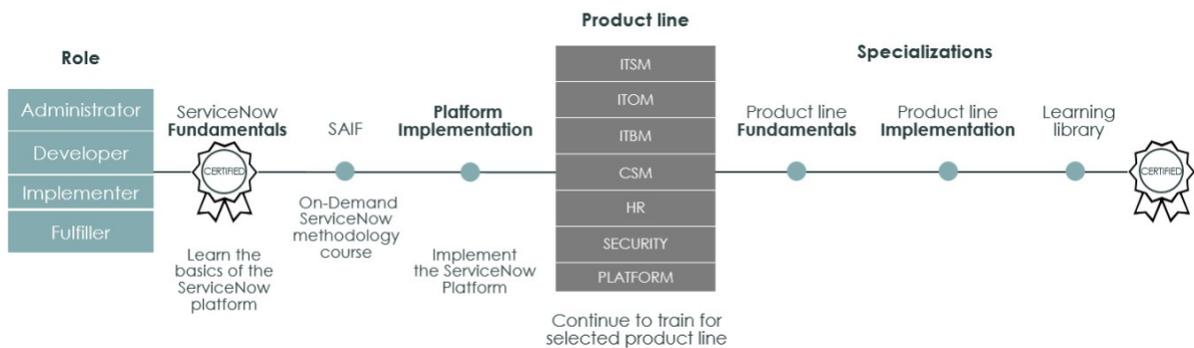
Figure 1: ServiceNow Technical Training and Certification Model

What to do next

Having built a training plan for each member of your ServiceNow platform team, you're on the path to building your team's expertise. But be prepared to revisit your training plans when:

- Your ServiceNow product roadmaps change, requiring new product expertise in, for example, HR, CSM, or ITOM

- You need to support ServiceNow upgrades

- Your platform team receives poor product satisfaction surveys from your process user teams and other users

- Your platform team expands or changes

Step 3 – Develop a product training plan for ServiceNow process users

KEY INSIGHTS

- Collaborate with process and service owners to build a curriculum that reflects how you should work in ServiceNow.

- Build ongoing support for training and new work processes from senior leaders and the line managers of process user teams.

- Plan to complete training 15 days before your go-live date, conduct train-the-trainer (TTT) sessions even earlier if you have a lot of users to train—and make training required.

- Create multimodal training material

The training you give your ServiceNow platform team establishes the important background, insights, and skills it needs to effectively implement and manage ServiceNow. As you start to approach your go-live, start training your process users first, and then move on to other ServiceNow users.

Your process users include your service desk agents and customer service representatives, and training them first leads you to successful organizational adoption and service delivery. They'll conduct and manage all of the work happening in ServiceNow, so create engaging and innovative process user training to get them on board.

To develop a training plan for process users, complete these action steps:

1. **Determine what resources you'll use to train your process users.**

   Determine who'll deliver your customized training to process users: ServiceNow, your partner, an internal team, or a combination of providers. Assign a training coordinator as well. Do this at the start of the implementation, and allow sufficient time to create the custom training content. For example, if your team is developing training from scratch, it could take two to three weeks just put together the first draft. Building e-learning or custom guided tours can take even longer.

2. **Meet with senior management to ensure ongoing support for process user training.**

   It's vital that you work with the senior leaders of your process user teams to build support for training and so they can make room for training in the trainee's work schedule. Meet

with these leaders regularly to educate them on ServiceNow capabilities, gain their buy-in, and guide the training curriculum.

3. **Create a curriculum plan to determine the learning activities for process users –** To deliver world-class service, process users need to learn about both ServiceNow and service management. Work with process users and their leaders to build a list of training objectives and a list of courses to develop and deliver based on those objectives. Process users will give a lot of the input for custom process user content. Assign trainers to develop materials for each training course.

4. **Create a calendar that lists upcoming and future training opportunities –** Create a training calendar across delivery channels (such as classroom or virtual), and work with process user leaders to communicate the training options available.

5. **Develop a training scorecard –** Determine how training has impacted employee and team job performance by tracking metrics like satisfaction survey scores, first-call resolution, and time to resolution.

Customer insights

Our customers say you should keep these five things in mind as you develop a training plan for ServiceNow process users.

INSIGHT 1:

Collaborate with process and service owners to build training on "how work gets done"

There's a limit to how deeply your ServiceNow platform team can train process users across their many types of needs. The platform team may be experts on ServiceNow but not on specific process user processes (like incident or case management) or subject matter (like HR or CSM). For scalability, and to connect product training to work processes, ask your service and process owners to help you design and develop the training.

Best practice – Work with process and service owners to merge your training plans

The training you provide to process users on specific processes should reflect how to execute them in ServiceNow. This means that your process and service owners need to be trained in ServiceNow well in advance of your fulfillment teams. You also need to make sure that any redesign of your work processes is completed before training begins and communicated to those creating the content for the ServiceNow focused training.

"When the platform team is leading training, it's focused on
where you can train in general, and then where you need to zero in on
specific things relevant to the trainees. Let service owners in those spaces take
on some of the training for specific needs —for process users working with a
specific product. We tell them the efficient ways to navigate the tool, and
then tell them to bake that into the specific processes for their team."

– A ServiceNow customer

INSIGHT 2:

Build support for changing how people work – not just for training

The biggest root cause of failed training plans—even well-designed plans—is insufficient managerial support for changing process user work activities once the training is over. To avoid this, get process user managers involved when you develop and test your training plans.

Remember, if the line managers don't support the training—or the required behavioral change after training—users won't take the training seriously, their adoption rates will be low, and they'll revert back to old ways of working.

Best practice – Build ongoing support for training

Encourage the managers of your process user teams by:

- Engaging managers (and key influencers) in developing, reviewing, and testing your training plans and content since they're important stakeholders for this process

- Making sure managers have a post-training action plan for process users, one that directs process users to implement what they learned

- Ensuring that managers are prioritizing (and championing) training, especially by making time for it, having it built into quarterly/monthly learning and development plans, and holding teams accountable for completing it

Work with your OCM program lead to help promote training to leaders as part of your organization's change management plan. Before the training, make sure students know:

- What ServiceNow is

- Why it's being implemented at their company

- WIIFM (what's in it for me)

INSIGHT 3:

Time your training close to go-live

When your ServiceNow implementation gets close to the go-live date, you'll have many competing activities and priorities. You might be tempted to pass the training obligations off to another person or team, or you might want to delay training because you're feeling crushed by the pressures of go-live.

Don't do it, because if you do, you're likely to leave your process users ill-equipped to perform their new work activities and you'll risk having slower adoption. This truly sets you back in accomplishing what you set out to do with the implementation.

Best practice – Complete training fast and make it required

Complete your training no sooner than 15 days prior to the go-live date, and work with your executive sponsor to ensure users know the training is required and nonnegotiable. Involve select process users in user acceptance testing (UAT), and time the training so the greater process user community finishes a month before (or whenever your planned UAT ends) the go-live date. This way, your process users can retain and use the new knowledge.

EXPERT TIP
Make sure you build enough time into the project plan to allow internal trainers to train the wider process user audience. You can only build dustom content for process user training toward the end of an implementation, when screens are frozen, to capture screenshots that reflect the state the system will be in at production.

Best practice – Provide a sandbox instance for learners

Provide a sandbox instance for process users to test what they learned before go-live. Require students to complete a task on the sandbox instance to see what they can

successfully do using the Now Platform. For example, you might ask students to open and resolve an incident and enter their full names in the short description field, then report on it to ensure its compliance.

Offer multimodal training materials

Too often, training is only seen—and delivered—in one way: classroom style. When the course is over, there's often limited access to tools, so learners can't refresh, reinforce, or continue their learning. All learners—including process users—have different learning styles. That means classroom-style training will be effective for some, but not all, of your learners.

Instead of thinking of training in that one (old) way, think of it as a recursive process or journey that has multiple points and modes of engagement. And use alternate learning activities to reach learners with different—or multiple—learning styles.

Learning activities

- Include learning about ServiceNow in opportunities such as new hire onboarding, all-hands meetings, and team meetings

- Short videos and knowledge articles on your service portal, supported by quick reference guides

- Custom, guided tours and embedded help

- E-learning courses

- One-page desktop reference guides you can leave on users' desks or deliver electronically

- Quizzes to reinforce classroom training

- Lunch-and-learn sessions

- Create multiple avenues to answer process users' questions during training and for a few weeks after go-live, such as:

  – Walk-up genius bars in lunch areas and other gathering spots

  – A temporary hotline number and email address

- Social media and/or gamification campaigns

- An online FAQ with questions collated from live training sessions

The most important trend in training is the movement away from using classic classroom training and toward a blended approach. Delivering training through videos (like YouTube) and e-learning options, and providing mobile access to them, allows students to learn

whenever, however, and wherever they want. Using a blended approach also makes your training more scalable, especially for large global teams.

When you deliver your training, give process users the opportunity to share their concerns, provide feedback, and ask questions. Two-way communications create buy-in and allow learners to engage in the process fully. Also make sure you reinforce all training through peer and manager support, feedback, and an accountability loop so your training is sure to lead to changes in work behaviors.

Lastly, use your organization's learning management system (LMS) when you develop your training strategies. This way, you can centralize and manage your training, like ITIL/ITSM courses for ServiceNow, into your LMS. You can deliver individual training plans using the LMS so employees can get credit for completing each training requirement.

> "I manage all of my training right within ServiceNow by
> creating a catalog item for each training course. I use ServiceNow
> guided tours and our knowledge base to serve up training content.
> This keeps all users engaged completely within the platform."
>
> **– A ServiceNow customer**

> "It's very important to consolidate all training resources in one
> place. Establish early on where that place will be and maintain
> it as the central location. Renew it every three to six months,
> because it goes stale quickly."
>
> **– A ServiceNow customer**

EXPERT TIP

Short how-to videos and custom, <u>guided tours</u> provide users with on-demand information at their fingertips. While these do not replace formal training, they offer just-in-time support for a new generation of learners who expect information to be readily available and easy to find.

INSIGHT 5:

Carefully select your TTT team and then train them

When you train large process user teams, especially for global organizations, it can become a time and resource constraint to ensure you have enough trainers to teach everyone. Of course, you also want to avoid exceeding your budget by using a third party to deliver the training. To avoid the resource pitfalls, use the TTT approach.

Best practice – Make sure you have effective people in the TTT role

Assign someone that has prior training experience if you can. When you evaluate potential trainers, look for these key skills and characteristics:

- Strong communication

- Team building

- Delivering presentations

- Organization and/or project management

- A passion for learning

- Ability to motivate adult learners

- A high level of professionalism

Heads up!

You'll select people for the TTT role who have never trained before and are new to ServiceNow. To make sure every one of your trainers is set up for success, here's how to prepare them to train process users in service management and the Now Platform:

- Decide who is going to train your TTT team. This might be your ServiceNow platform team, your partner, ServiceNow Custom Training and Adoption, etc.

- Train your TTT team for at least one day on the custom training course they'll deliver—even though the class your trainers will deliver maybe only three or four hours long. You need extra time to make sure your TTT team gets the full context so they can deliver the training themselves.

- Record the training sessions for the TTT team to refer back to.

- Ask the TTT team to perform "teach backs." They teach the course to other trainers before they deliver it to process users.

- Provide the TTT team with ServiceNow instances so they can play with it—and so they can enhance their understanding of the tool.

- Schedule open Q&A sessions for the internal trainers a few days following their initial training sessions to give them time to look through the materials and prepare demonstrations.

If you're short on people with training experience, consider sending your potential trainers to a class on how to be a trainer. You can find several options online.

Also, consider running a pilot with your TTT team with a few selected process user teams before they train the entire group. This will help enhance the team's effectiveness, and it gives you the time to have a session on the lessons learned. Then you can work together to incorporate those lessons into their training delivery.

Lastly, make sure internal trainers are given ample time to prepare before they're required to deliver training.

What to do next

Now that you've established a training plan for process users, you can prepare them to effectively deliver the services you offer using ServiceNow. Be prepared to revisit your process user training plan as you:

- Update processes that change your ServiceNow user interface and workflow

- Implement new product enhancements through new developments or an upgrade

- Adopt innovative tools like machine learning

  - See our Success Playbook on Predictive Intelligence for more information.

Step 4 – Extend service management training to the broader organization

KEY INSIGHTS

- Focus your training on explicit use cases to demonstrate value, and keep them short to overcome change inertia.

- Build exposure to training opportunities using marketing tactics, like flyers in high-traffic areas, social media channels, gamification, giveaways, etc.

Now it's time to extend your training beyond the ServiceNow platform team and process users to familiarize your entire organization with what's offered by ServiceNow. Your employees and customers are the last mile in service delivery, and they need to know how to use ServiceNow to meet their business needs.

To extend training to the broader community, complete these action steps:

1. **Introduce ServiceNow to users.**

   Target your training toward employees or customers submitting service requests so you can teach them how to use the platform, promote service management awareness, and increase ServiceNow adoption. Make users aware of how they can benefit from using the services and information available on ServiceNow, and how they can use self-service to meet their needs.

2. **Deliver user training and tools through multiple channels.**

   As you did for your process users, create and provide access to short videos, infographics, quick reference guides, custom, guided tours, and other tools to provide insight for people with varied learning styles.

Customer insights

Customer experience points to two things to remember as you extend training to users.

INSIGHT 1:

Focus your training on explicit use cases

What users need is an understanding of how to use ServiceNow—through the Service Portal, Service Catalog, and Employee Service Center—to improve their work. But this understanding needs to be relevant to users' day-to-day work. When you focus training on product functionality without the context of specific use cases, you can create ambiguity around the benefits the Now Platform delivers. Users need to understand WIIFM to adopt and use ServiceNow effectively.

Best practice – Training should teach users the value ServiceNow provides

Focus your training on explicit use cases—employee onboarding or password resets—to demonstrate the value you're getting, like faster time to productivity. Make sure it takes learners minimal time to complete each case so they don't become reluctant to try the tool. Ideally, pair your use cases with your change management plan to promote adoption, along with your efforts to design and deliver great experiences in ServiceNow.

Best practice – Deliver process training before ServiceNow user training

Your process users should deliver the process training before they deliver training to other ServiceNow users. If they don't do this, a ServiceNow-focused training session can end up derailing and becoming a process discussion instead. Separating process and ServiceNow user training will positively affect the quality and success of the training sessions.

INSIGHT 2:

Use multiple channels to expose training to users

It's never easy to schedule training when users believe it interferes with their "real" work. It's OK—recognize that users will feel this way, and recognize that they often don't have the time, or the energy, for training. Then meet users where they are by giving them multiple ways to complete their training, including e-learning options and mobile access.

Best practice – Approach training like a marketing campaign

- Use simple tactics, like promotional flyers in high-traffic areas (breakrooms, elevators, etc.) that highlight training opportunities and resources.

- Use popular social media channels.

- Gamification can be a smart gauge on how much awareness and enthusiasm you have created. Try it, then check your participation metrics.

EXPERT TIP

Consider building an alert in ServiceNow for employees using a feature for the first time—like a pop-up that offers guidance about how to use the feature effectively, for example, how to build a custom, guided tour for portals.

Our Success Checklist on building a community of champions and Customer Success Center provides more guidance for using a community of champions to help promote user training.

What to do next

Having extended training to your user community, you're building awareness of how ServiceNow can help them improve their work. But, like other training, don't let this be a one-and-done event. Continuously build user awareness for a complete and long-term ServiceNow transformation. Revisit your user training plan as you:

- Update processes that change your ServiceNow user interface and workflow

- Deploy new product enhancements after a new development or an upgrade

- Deploy innovations, like chatbots

Step 5 – Build career development and learning

KEY INSIGHTS

- Give your ServiceNow team access to different growth opportunities they can explore as potential career paths.

- Designate time and resources to ongoing career development and learning related to ServiceNow and service delivery, and work with your executive sponsor to champion the effort.

Developing expertise in your platform team and among your process users needs to serve their career aspirations and interests as much as your organization's needs. So provide continuous, ongoing learning that supports career paths that promote and support your business objectives and vision for transformation. To do this:

- Actively track new developments in service delivery and ServiceNow functionality, and identify what training you need to make new approaches work across the enterprise.

- Continue to expand ServiceNow expertise beyond the core team. This will allow the broader organization to identify new opportunities and use cases for enterprise transformation with ServiceNow.

To build career development and learning connected to ServiceNow, complete these action steps:

1. **Create career development paths for your Now Platform and process user teams.**

   Digital transformation starts with people, so it's critical to develop the people—that is, your Now Platform and process user teams—who will execute your transformation vision and deliver your desired business outcomes. Work with leaders of those teams to link ServiceNow and service management training to career development and growth opportunities.

2. **Build a talent pool for the ServiceNow platform team.**

   Process users can be an expanded resource supporting the platform team—and it exposes process users to potential career paths on the platform team.

3. **Provide ongoing training opportunities.**

   Use multiple avenues to provide your teams with ongoing learning opportunities through a combination of classroom and nonclassroom activities, and be sure to align your training plan with your ServiceNow roadmap.

4. **Provide your ServiceNow platform team with training on topics beyond standard product and skills training.**

   Incorporate education on your organization's <u>vision and objectives</u> so the team can understand and deliver better business outcomes. Promote training on <u>human centered design</u> (HCD) to arm the team with the skills they need to provide better <u>employee and customer experiences</u>.

5. **Create a feedback loop to extract the lessons learned from training.**

   Review training feedback to incorporate the lessons learned into enhanced training and product design.

Customer insights

As you build your career development and learning opportunities, our customers say to keep these two things in mind.

INSIGHT 1:

Expose the platform team to growth opportunities

Over time, proficient, confident teams can risk feeling stale or burned out, especially if they don't have a variety of job duties and development opportunities. This can make employee retention challenging, especially if you're not prepared with a succession plan.

To increase your retention, let your teams know that their work is contributing to their career growth. And ask leaders to make those growth opportunities explicitly available.

Best practice – Give your ServiceNow platform team opportunities for career growth

Give this important team opportunities to identify potential career paths. Offer opportunities for job shadowing and job rotation. This added exposure also helps build knowledge and context around your ServiceNow program and the roles different teams play in managing and using ServiceNow. In the end, these activities can help retain your talent and build your ServiceNow talent pool. Some examples of job exposure include:

- A ServiceNow developer handling ServiceNow admin duties during the latter's vacation time

- Using process users to support development, design, and testing opportunities (through job rotation or job shadowing)

- Extending ServiceNow certification opportunities to process users

INSIGHT 2:

Put time, resources, and accountability in place for continuous learning

As the services journey develops, your training and development needs will shift rapidly. Organizations that fail to allocate enough resources for ongoing development and learning—or that fail to make their teams accountable for keeping up to date with innovations in service delivery and ServiceNow products—risk falling behind as they try to reach their transformation goals.

Best practice – Make ongoing career development and learning an explicit, conscious effort

Hold your platform team accountable for training. Give them explicit objectives, and work with your executive sponsor to ensure they have sufficient time and resources to support training. Include support for networking opportunities at ServiceNow events, and collaborate with your partner and other customers to keep up to date on best practices.

What to do next

Your team members' career aspirations and outcomes can come to life at the same time as your desired business outcomes. Work with your executive sponsor, HR business partner, and learning and development team to ensure that you have career paths and rewards in place to encourage continued learning and growth.

![servicenow logo]

The takeaway

Building and training an internal team of ServiceNow experts involves targeting three populations:

- **ServiceNow platform team –** Train this group to design, support, and maintain ServiceNow.

- **Process users –** These include service desk agents and customer service representatives who need to be fully trained to work in ServiceNow and support the services you offer.

- **Users –** Make this group aware of how service management can support their work, and help them become comfortable with the tools and services you offer through ServiceNow.

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

Good – You've identified and executed training plans for the platform team, process users, and users prior to your implementation go-live date.

Better – You've identified and executed training plans and supplemented that training with multimodal learning to address different learning styles and ongoing resources. Plus, you have ServiceNow-certified professionals on your platform team.

Best – You've identified and executed training plans, and then incorporated ongoing learning activities to serve both the changing needs of your organization and career needs of your employees.

What should I convey to my team?

Building and developing ServiceNow and service management expertise is key for your organization's enterprise service transformation. Training will not just help your organization implement ServiceNow—it will aslo help implement new approaches work across the enterprise.

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.
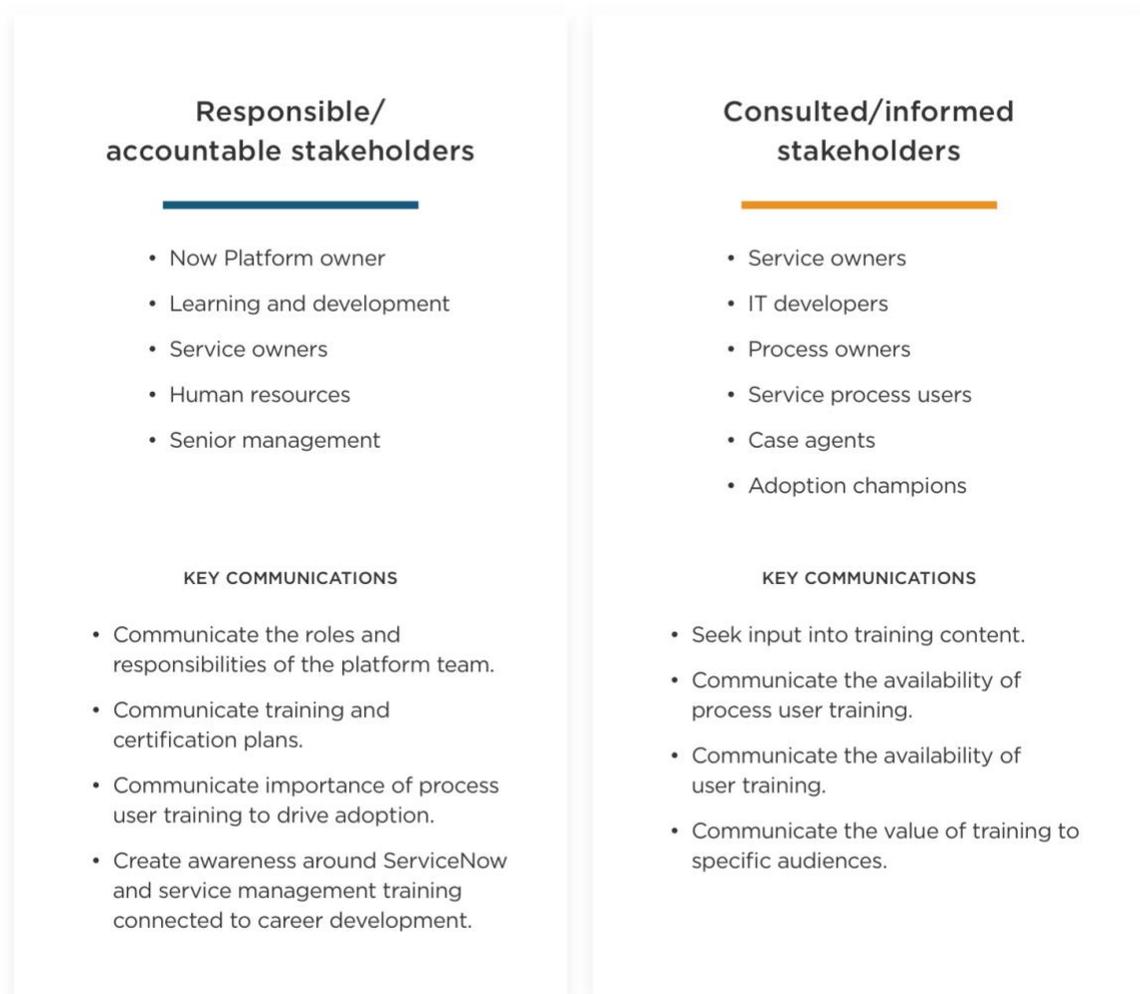
Appendix

Key performance indicators (KPIs)

To determine if you performed the actions in this Success Playbook effectively, measure these top KPIs:

- *# certified staff for key ServiceNow roles* – This KPI counts the number of certified ServiceNow professionals you have in key ServiceNow roles (your platform team and process users, for example).

- *Impact of training on job performance* – Use this KPI to identify metrics before and 60 to 90 days after training to identify changes in job performance (like customer satisfaction surveys, first call resolution, time to resolve).

- *# staff that have completed business skills training* – This KPI counts the number of staff members that completed business skill training, in line with your assessed needs.

Stakeholder management

Use this chart to identify which stakeholders need to be held responsible/accountable and the stakeholders that you need to keep consulted/informed.

Responsible/accountable stakeholders

- Now Platform owner
- Learning and development
- Service owners
- Human resources
- Senior management

KEY COMMUNICATIONS

- Communicate the roles and responsibilities of the platform team.
- Communicate training and certification plans.
- Communicate importance of process user training to drive adoption.
- Create awareness around ServiceNow and service management training connected to career development.

Consulted/informed stakeholders

- Service owners
- IT developers
- Process owners
- Service process users
- Case agents
- Adoption champions

KEY COMMUNICATIONS

- Seek input into training content.
- Communicate the availability of process user training.
- Communicate the availability of user training.
- Communicate the value of training to specific audiences.

Related resources

- Success Checklist – Build an internal team of ServiceNow experts and train users
- Best Practices Community Forum – Create Excitement, Drive Adoption
- ServiceNow platform team sizing modeler
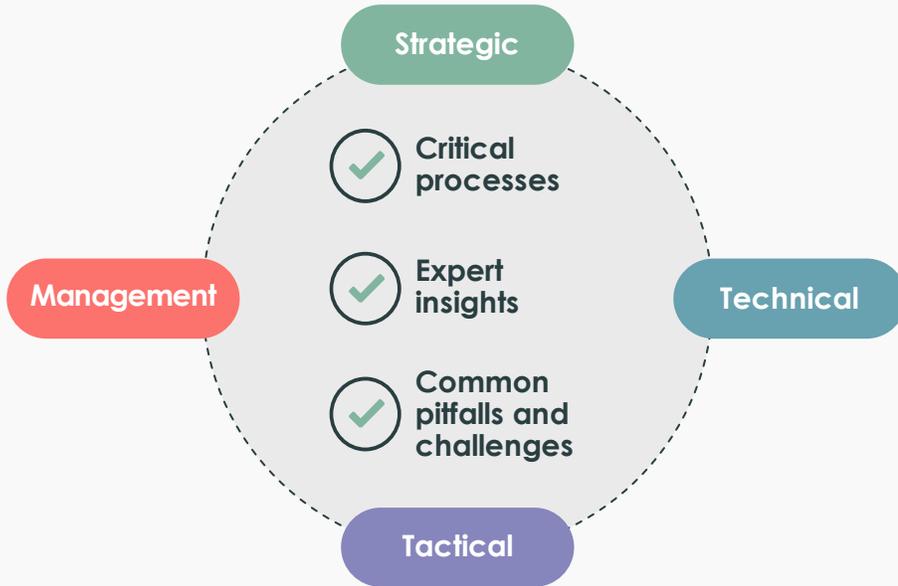- Training Package Templates and Samples

- [ServiceNow Champion Enablement](#)

- [Building the ultimate ServiceNow platform team](#)

- [What is ITIL? Your guide to the IT Infrastructure Library](#)

- [ITIL certification guide: Mastering IT services management](#)

- [Top-tier ITSM skills go beyond a good tool set](#)

- [The 6 habits every great trainer must have](#)

- [LinkedIn Learning – Train the Trainer Class](#)

- [ServiceNow Training and Certification Quick Reference Guide](#)

- [Platform Team Charter template](#)

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