How can I manage IT work in ServiceNow to support better planning?

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What types of work can I manage in ServiceNow?

Most IT teams work on different types of tasks, using different tools, making it hard for them to keep track of all their work. In turn, IT leadership cannot get a 360-degree view of where their resources are being used. IT work can generally be categorized into operational, project, or Agile work. ServiceNow® is designed to plan, execute, and track all three types. This provides team members with a better, more unified experience, and offers IT leaders visibility into resource capacity and use.

	Operational work	Project work	Agile work
Description	Work that's required to support ongoing IT and business operations, with very short time frames to plan and execute	Planned work that is part of a larger effort (e.g., project, program), and typically has longer lead times to plan and complete	Work that is broken down into small chunks and completed within a short timeframe; planning and execution occurs in 2- to 3-week increments.
Tool examples	ServiceNow ITSM, Remedy	ServiceNow PPM, Clarity	ServiceNow Agile, Jira
Task examples	Incidents, service requests	Project tasks, demand tasks	Stories, features, scrum tasks

What are the benefits of managing all IT work in a single platform?

Using a single platform to manage work benefits team members or workers who perform the work, team leaders or managers who prioritize and assign work to their teams, and portfolio managers who can see all their work in single view. Benefits include:

1 **Improved visibility into resource spend** allows managers to assess whether their teams are working on the most valuable tasks. Managers can reprioritize work assignments in response to shifting priorities.

2 **Better worker experience** as team members have a single location to see all assigned work, update their progress, and track time spent on different tasks.

3 **Increased collaboration** across teams as they see each others' work, spot collaboration opportunities, and identify dependencies across teams.

How can I manage IT work in ServiceNow to support better planning? (Cont.)

What prerequisites are required before I can track all work in ServiceNow?

Setting up core data in ServiceNow is a prerequisite and key driver to realizing the benefits of tracking different types of work on a common platform. Core data include users and groups, business units, locations, services, and applications. Follow the steps below to use core data within ServiceNow:

1. **Identify core data** that's most useful for decision-making. Common examples include, users, user groups, a list of business services, or business applications.

2. **Determine the common data elements** that different task types can use. For example, assignment groups and CIs—such as business applications—are common data elements on all task types.

3. **Design the data model** to accommodate the needs of teams performing different tasks. For example, granularity of user groups to meet operations and project team needs, business applications with references to support teams, and business owners.

4. **Configure task records** to include fields for these data elements. Make these reference type fields and make them mandatory.

5. **Educate users** that track work in ServiceNow on the importance of this data, so they realize the value of entering accurate data.

Practitioner tip: When migrating core data from a current solution to ServiceNow, it's common to have similar data in both systems, such as a list of applications or user groups. Make sure to set aside time in the implementation project to reconcile and update data in ServiceNow.

What decisions can I make by managing all work in a single platform?

Visibility into the time spent across different types of work supports other decisions that IT leaders make around resource allocation and investment prioritization.

1. **Resource allocation and capacity planning –** Senior IT leaders use this data to plan team capacity, make resource allocation to teams, applications, or services that support strategic priorities.

2. **Investment prioritization –** Time spent on different types of work can help identify and prioritize investment opportunities. For example, prioritize higher value strategic work over operational work; invest in automation to reduce time spent on manual, operational work; shift lower-value work (e.g., incident management) to vendors.

How can I manage IT work in ServiceNow to support better planning? (Cont.)

What are some sample reports that track work?

Time by task type for a single team

- Project tasks
- Stories
- Changes
- Incidents
- Meetings and Admin
- Service requests

% time spent trend by quarter

Q1 Q2 Q3 Q4

- Operational
- Project
- Agile
- Admin

% time spent trend by Team

Team 1 Team 2 Team 3 Team 4

- Operational
- Project
- Agile
- Admin

- **Audience –** Team manager with one team
- **Insight –** Team's time spent on operational vs strategic work; informs investment prioritization

- **Audience –** Team manager with one team
- **Insight –** Changes to work allocation across time; informs team capacity planning
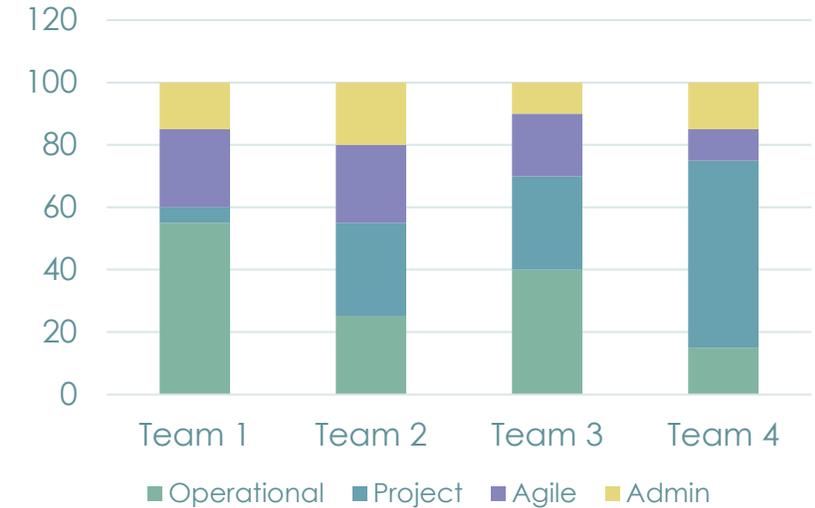
- **Audience –** IT leader with multiple teams
- **Insight –** Distribution of work types across different teams; supports resource utilization and capacity planning decisions

Related resources

- Product Docs – ServiceNow ITSM
- Product Docs – ServiceNow PPM
- Product Docs – ServiceNow Agile Development
- Product Docs – Agile Development – Unified Backlog

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.

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