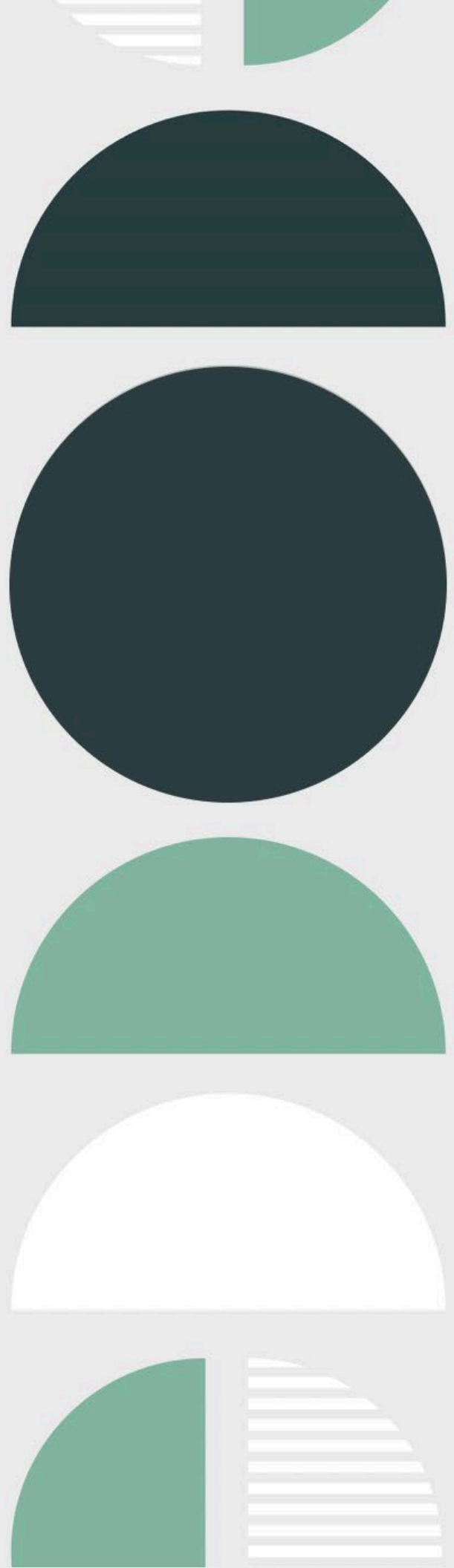


# Executive sponsor engagement

Developed by the ServiceNow Best Practice Center of Excellence

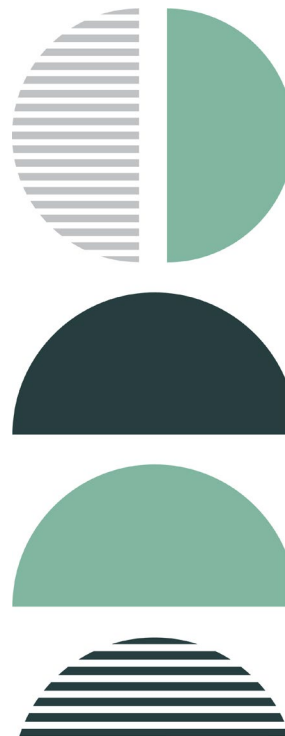
September 2020



## What is an executive sponsor?

The executive sponsor is a senior leader who maintains oversight of the [ServiceNow® platform support team](#)—the group responsible for establishing, maintaining, and extending ServiceNow as a strategic business platform. The executive sponsor is responsible for overseeing the ServiceNow strategic roadmap and making certain it aligns with measurable business outcomes. The executive sponsor also drives the platform support team's goals by setting their strategic vision and direction, then working with executive peers to communicate the value of ServiceNow and remove organizational roadblocks.

The ServiceNow executive sponsor is a critical partner to the platform team because this person is responsible for establishing the relevance of the Now Platform® to the rest of the enterprise.



## Why should I invest in executive sponsor engagement?

An engaged, prepared executive sponsor helps you make sure the decisions you make for your ServiceNow implementation align with your organization's business vision and outcomes. Your executive sponsor can help you establish consensus faster among your key stakeholders and help accelerate critical decisions.

But the engagement and effectiveness of your executive sponsor depends on your preparation. You need to ensure that your executive sponsor (or sponsors) are clear on their role and responsibilities. Once you understand how much time your sponsor is willing to commit to ServiceNow – and how much information the sponsor needs to make decisions – give them the right education, action plan, and supporting resources to be an effective advocate for your ServiceNow implementation.

## What will this workbook help me do?

When you complete the steps in this workbook, you should be able to:

- Make sure your executive sponsor has the right level of authority and influence to be an effective advocate
- Define the role and responsibilities of a ServiceNow executive sponsor
- Develop an action plan and make it your framework for ongoing collaboration and engagement with your executive sponsor
- Prepare your executive sponsor with a clear story that supports ServiceNow expansion discussions at an executive level

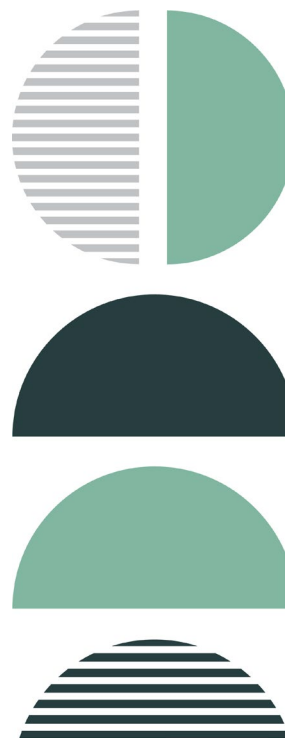
## How to use this Success Workbook

This Success Workbook guides you through the steps to engage and prepare your executive sponsor(s) to support and advocate for your ServiceNow implementation.

Start by reading through the [Workbook Checklist](#) – review the steps and tasks you need to complete to get started engaging your executive sponsor.

From the checklist page, you can either proceed through the workbook page-by-page or navigate only to the sections that you need using the hyperlinks.

Each section includes “check your progress” questions that you can answer to test whether you need to complete the tasks listed on that page – if you've already done so, you can move forward. Hyperlinks are included throughout the Workbook so you can navigate back and forth between the checklist page and different sections.



## Workbook Checklist: Executive sponsor engagement

### Step 1: Define the executive sponsor's responsibilities

- Define the responsibilities necessary to oversee the ServiceNow strategic roadmap and make certain it aligns with measurable business outcomes.
- Determine the candidates who might take on the executive sponsor position.
- Define what good looks like for an executive sponsor.
- Schedule a cadence of meetings with your executive sponsor that you'll use for a combination of ongoing education and executive sponsor alignment.

### Step 2: Train and prepare your executive sponsor

- Review the role and responsibilities of a ServiceNow executive sponsor—the things you need them to do to be successful in the role and effectively support the platform team's needs from the organization.
- Define the training needs for an executive sponsor so they have a baseline education of the Now Platform.
- Provide the executive sponsor important information about your implementation project and/or other important initiatives.

### Step 3: Create an action plan for your executive sponsor

- Identify the actions you need your sponsor to take to support the ServiceNow implementation project or other initiatives.
- Identify the actions the executive sponsor will have to take that aren't specifically in a plan but should be part of their ongoing responsibilities.

### Step 4: Work with your executive sponsor to expand ServiceNow adoption

- Identify key stakeholders in each business area that your executive sponsor can target to become adoption champions.
- Give your executive sponsor methods to effectively champion the value of the Now Platform to business units and stakeholders.



## Step 1: Define the executive sponsor's responsibilities

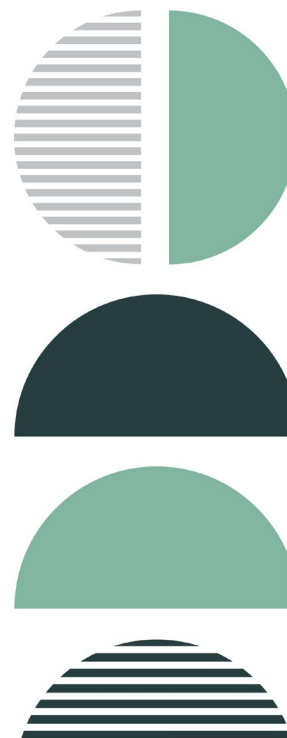
Define your executive sponsor's responsibilities explicitly to make sure you have a leader who can help effectively communicate your team's vision for transformation, remove organizational obstacles to success, and get access to needed resources. Organizations that treat the executive sponsor role as a formality – that is, as “someone who just signs the checks” – can struggle later when they need senior-level engagement to resolve implementation challenges and other roadblocks.

### Check your progress:

- Have you explicitly defined your executive sponsor's responsibilities?
- Does your executive sponsor have the authority and influence needed to execute these responsibilities?
- Have you defined an engagement cadence with your sponsor?

If you answered “yes” to both questions above, proceed to the [next step](#). If not, complete these action steps:

1. **Define the responsibilities necessary to oversee the ServiceNow strategic roadmap and make sure it aligns with measurable business outcomes.** The most important role that an executive sponsor can take is to assure that decisions regarding your ServiceNow implementation align with a clear business vision and outcomes. Create a [job description](#) for the sponsor role that explicitly lays out what they should do to align with clear business outcomes. These responsibilities should include:
  - Creating the vision and strategy for the program team managing the Now Platform
  - Leading the definition of the [platform team charter](#) – The team charter is a written document created to provide the true “north star” for a team or project that spells out the team’s mission, scope of operation, objectives, consequences, and, if applicable, time frame
  - Establishing ServiceNow’s product positioning within the overall organization architecture and the establishment of ServiceNow as a strategic solution for the enterprise
  - Extending the ServiceNow [business case](#) by defining and validating business objectives (e.g., transformation) and a value realization strategy (e.g., IT productivity up 20%)
  - Partnering with the platform support team to see that the team and platform capabilities are aligned with the business vision and strategy
  - Understanding the capabilities of the platform owner and platform team
  - In partnership with the platform owner, supporting changes and/or additions to the platform support team to improve its ability to execute



- Chairing the ServiceNow [strategic governance](#) steering board (i.e., the executive steering board), which includes leading and actively participating in the governance meetings and activities to:
  - Communicate the executive vision
  - Promote alignment with the enterprise
  - Ensure execution on that vision
- Supporting the [organizational change management](#) (OCM) program team through activities to help support change management (e.g., contributing to the stakeholder analysis, contributing the OCM plan, and publicly supporting and delivering messaging that supports necessary change)
- Approving the funding for ServiceNow [business case\(s\)](#)
- Managing the ServiceNow budget and coordinating the priorities for budget requests
- Acting as the executive point of approval authority and the final point of escalation for all decisions and policies that govern the Now Platform

- 2. Determine the candidate roles that may take on the position of the executive sponsor.** Identify candidates who have the right level of authority and influence in your organization so your sponsor can effectively execute their responsibilities. In many cases, this is as important, or more, than the sponsor's experience with system implementation. In IT, typical candidate roles include the chief technology officer or chief information officer, VP or senior director of applications, or VP or senior director of enterprise architecture. The best executive sponsors tend to be C-level leaders because their level allows for more access to C-suite peers, increased visibility to business vision and strategy, and greater approval and advocacy powers (e.g., direct access to the CFO to gain budget approvals.)

Because of competing demands, some organizations may be tempted to delegate the executive sponsor role or assign it to individuals with previous experience in system implementation. While this may appear logical, it overlooks the two most critical roles that an executive sponsor can play: removing organizational roadblocks to implementation and leading change across organizational silos. Your executive sponsor doesn't need experience as much as they need the **authority** to remove roadblocks and sufficient **influence** to lead and champion change.



**Practitioner insight – Evaluate the informal and formal influence of your executive sponsor candidates.**

To the extent that you have the scope to select or recommend an executive sponsor, evaluate the formal and informal authority and influence your candidates have in your organization. Ask yourself:

- Which of my potential sponsor candidates has been most successful at leading change, especially in areas where they have no formal authority?
- What authority do my potential sponsor candidates have to allocate (or reallocate) resources if we encounter implementation challenges?
- Do my potential sponsor candidates have a strong leadership profile across organizational silos? Do they have a track record of influencing the direction of cross-functional initiatives?

- 3. Define what good looks like for an executive sponsor.** Emphasize that your executive sponsor will take an active role in setting the strategy for your ServiceNow implementation. To do this, define how the role can (and should) accelerate opportunities for business value creation while benefiting the sponsor's own career. Good sponsorship should include:
- Actively engaging in setting the strategic direction for the ServiceNow team
  - Effectively communicating how ServiceNow solutions can solve C-level business issues, citing success stories and the value already captured by ServiceNow adoption to gain support
  - Accelerating adoption of the Now Platform in those parts of the enterprise where ServiceNow can add business value
  - Evangelizing for ServiceNow's potential to make digital transformation a reality across the enterprise
  - Identifying where and when to delegate tactical decision-making and approvals related to ServiceNow governance
- 4. Schedule a cadence of meetings with your executive sponsor that you'll use for a combination of ongoing education and executive sponsor alignment.** Take the lead in defining a cadence of engagement based on your executive sponsor's needs for ongoing education and your need to align ServiceNow implementation and management with the organization's financial planning and IT portfolio planning cycles. Meeting with your executive sponsor is not only about providing project updates—it should also involve open and candid discussions about all aspects of your ServiceNow implementation.

Working with the executive sponsor's assistant, schedule monthly check-in meetings to keep the sponsor updated on the health and value of the services ServiceNow is providing. Some tips to running these meetings include:

- Schedule the cadence in alignment with the organization's financial planning and IT portfolio planning processes (e.g., quarterly forecasting and budget meetings).
- Use the time to discuss upcoming decisions (e.g., governance or budget) or anticipated roadblocks (e.g., project delays or organizational resistance to change).
- If the executive sponsor declines meetings, still send monthly updates. Continue trying to get on the executive sponsor's calendar on a consistent basis.
- Meet with the executive sponsor early in the project (i.e., during one of the cadence meetings) to understand their goals and outcomes, and then incorporate those into ongoing discussions.
- Conduct a regular cadence of quarterly business reviews (QBRs) with the executive sponsor to validate if the solutions already deployed on ServiceNow still address current business needs, align with company strategy, and support new business objectives.

An executive's availability is usually limited, but it's important to keep your executive sponsor engaged in their role on the ServiceNow platform team. Don't be overbearing—but continue to push for meetings to keep the connection and engagement going.

To support these meetings, provide the executive sponsor with information they need to make informed decisions by [creating executive dashboards](#) on the Now Platform, and then teach your sponsor how to use them. Start with a session to coach and introduce your executive sponsor to the dashboards. Review and modify them based on your sponsor's feedback. You can make a review of these core to your ongoing meetings. Make sure to include the sponsor's assistant when you train them on the dashboards you create, so the assistant can help with their use.



**Discover your sponsor's engagement preferences.** Not all executive sponsors are made the same, but they can all be effective in their own way. Your engagement approach needs to account for the sponsor's personal preferences in terms of how they consume information, communicate, and make decisions. Without this, you're more likely to risk deteriorating engagement over time.

As you begin to define your cadence for engagement, ask both your executive sponsor and their direct reports about the sponsor's engagement preferences. Make sure you understand:

- **Your sponsor's leadership approach, particularly on decision-making** – Is your sponsor focused on the big picture or more detail oriented? Does your sponsor prize consensus, or are they more likely to take positions independently? This will help you both frame decisions as well as identify decisions that the sponsor is likely to delegate.
- **Your sponsor's communication preferences** – Learn how much information your sponsor prefers to receive and their preferred channel for communications—face to face, email, or some other form. Don't substitute other channels for regular face to face communications but knowing your sponsor's preferences will help you decide whether your meetings should be, for example, more frequent and informal versus less frequent and formal.
- **Your sponsor's workload and the cadence of their business function** – At a minimum, learn where your sponsor's attention and capacity is likely to be taken up with other demands, so you can plan your most important points of engagement at alternative times.



**Focus on relationship building.** Often, poor communication is the root cause of inadequate sponsorship. It's important you keep the executive sponsor up to date on the progress of your ServiceNow implementation, even when it's not all good news. This will help you build a relationship and rapport with the executive sponsor. Having this kind of open communication and trust will make it easier to alert the sponsor to the possibility of roadblocks, even if they haven't fully surfaced yet.



## Step 2: Train and prepare your executive sponsor

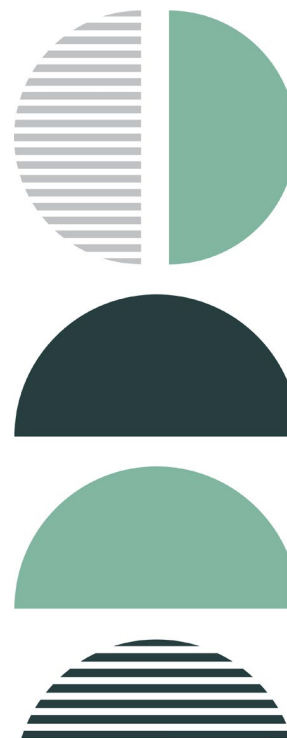
To be effective, your executive sponsor needs to be prepared. Preparation should include education about ServiceNow, the sponsor's role in strategic decision-making, governance, and oversight of the ServiceNow roadmap, and an understanding of how you'll realize business outcomes with ServiceNow. Your executive sponsor needs both the big picture and a tactical understanding of your implementation to address C-suite questions, manage challenges, and make effective decisions..

### Check your progress:

- Have you developed a training plan for your executive sponsor to prepare them for their responsibilities?
- Have you armed your executive sponsor with the information needed to support their responsibilities?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps:

1. **If you haven't done so, review the role and responsibilities of a ServiceNow executive sponsor defined in step 1—the things you need them to do to be successful in the role and effectively support the platform team's needs.** Provide the executive sponsor with a [job description](#) that describes what the role is expected to do (i.e., provide a summary objective of the job, job duties and responsibilities, what the best executive sponsors do, etc.). This should be documented so your sponsor can use it as a reference.
2. **Define what your sponsor needs to be prepared.** Build a training plan that includes the things the executive sponsor must know to be successful and to meet the team's needs. Describe the objectives of each training phase so the executive sponsor is clear on what they should learn. The training plan should include:
  - The free [ServiceNow Foundations eLearning course](#) (six self-paced, online modules)
  - ServiceNow success resources available on the [Customer Success Center](#), which offer best practice guidance based on the phases of the Now Value methodology
  - Baseline training on the ServiceNow products the organization is planning to implement (or has already implemented) – You can meet this requirement by providing the basic level of fulfiller training
3. **Provide your executive sponsor with critical information about your implementation.** Your executive sponsor needs to understand the basics of the ServiceNow products that have been or are being implemented, the partners supporting you, the business units involved, and any risks and roadblocks to implementation. Your goal is to be sure that your executive sponsor is the leading C-suite expert on your implementation.



Provide product information that isn't generic. Instead, connect the product information to the digital transformation use cases in your organization, ideally informed by peer use cases from your industry. Remember, your executive sponsor will be more interested in ServiceNow when they know how it relates to the business outcomes they care about. You should:

- ❑ Provide a baseline education on ServiceNow capabilities and their use cases. This gives your executive sponsor the context needed to effectively evangelize the value ServiceNow can bring to your organization.
- ❑ Provide a combination of ServiceNow resources, industry-related articles, and case studies for the executive sponsor to review. Ideally, these should focus on how industry peers have realized comparable business outcomes with ServiceNow.

Also, make sure to communicate the role and responsibilities of the executive sponsor to your platform team and, if you're in a large organization, your governance functions. This way, your teams will understand the support role the executive sponsor provides, including escalation paths, to avoid conflicts or confusion.



**Make sure your sponsor knows your stakeholders.** The success of your ServiceNow implementation can depend on your ability to effectively influence key stakeholders. Make sure your executive sponsor knows who they are, their role in implementation and adoption, and their level of engagement (e.g., active championship versus passive resistance).

One way to support your sponsor's training is to attend the annual ServiceNow [Knowledge conference](#) (ideally with your executive sponsor) where we share product information, use cases, and best practices. ServiceNow User Groups ([SNUGs](#)) are also excellent opportunities to learn from peers in your local area. You can also use your ServiceNow account team to support your engagement with the executive sponsor. This team can provide specific resources and tools for engaging with executive sponsors, like strategy and value realization sessions, peer-to-peer reference conversations, or executive briefings with ServiceNow executives.



**Remember to revisit your training when you upgrade.** After each upgrade, revisit your training to update your executive sponsor on changes in ServiceNow capabilities. You can also use these moments to identify new industry best practices, and determine what additional information your sponsor needs to be effective.

## Step 3: Create an action plan for your executive sponsor

Preparation doesn't end with training. Action planning helps inform, prepare, and make the best use of your sponsor's time and capacity in making key decisions about your ServiceNow roadmap and budget. Your action plan should be your framework for your ongoing collaboration and engagement with your sponsor.

### Check your progress:

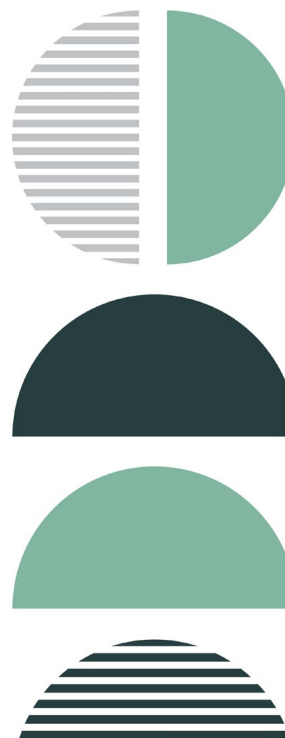
- Have you created an action plan to guide your executive sponsor's engagement?
- Have you identified potential roadblocks your sponsor may need to address?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps:

1. **Create an action plan with your executive sponsor.** Your action plan should map out the actions or decisions you need your executive sponsor to take in support of your implementation. Conduct a planning session with your sponsor to define your action plan. Be explicit in your plan about:
  - **Actions to be taken or decisions to be made** – For example, "We need to determine the headcount needed on the ServiceNow platform team."
  - **Objective of the action item or decision** – For example, your headcount is a necessary step to building your budget and determining the roles/skills needed on your team.
  - **Tactics to be used to develop the action or support the decision** – For example, you can use the ServiceNow [Platform Team Sizing Modeler](#), or seek out peers with similar implementation profiles.
  - **Expected next steps or outcomes** – For example, as you determine the headcount, you'll need to make sure the roles are appropriately defined and resourced.
  - **Expected timeline(s) for completion.**

You can create proposed action items in advance of your planning meeting with your sponsor – a starter checklist you can use to begin your discussion. These might include complex activities, like "review and approve the ServiceNow budget" or simpler activities, like "complete our executive sponsor training plan" or "attend the monthly business review with our implementation partner."

The table on the next page provides an example action plan that you can use as a template:



Executive sponsor action plan					
Creation date:		Revision date:			
Action item	Objective	Tactics	Outcomes and Next Steps	Deadline	Status
Craft our transformation vision statement with senior stakeholders	Provide a shared understanding of our transformation goals and what changes are required to get there	<ul style="list-style-type: none"> <li>Study industry and market trends</li> <li>Study peer case studies</li> </ul>	Identify the capabilities needed to realize our vision	9/30/2020	In progress
Review the ServiceNow roadmap with the platform team	Ensure our roadmap phases are aligned with business priorities	<ul style="list-style-type: none"> <li>Review our business case priorities</li> <li>Educate sponsor on ServiceNow product capabilities</li> </ul>	Identify milestones and KPIs for measuring progress against our roadmap		
Establish a strategic governance function	Establish sponsor oversight of our roadmap and value realization	<ul style="list-style-type: none"> <li>Identify roles and participants</li> <li>Define the governance decision-making process</li> </ul>	Set a cadence and agenda for strategic governance (executive steering) meetings		

The point of a good action plan is to provide a framework you can use to collaborate regularly with your executive sponsor and keep them engaged in implementing and managing ServiceNow. Don't think of the action plan as a deliverable so much as a living plan that keeps critical decisions, issues, and actions at the forefront of your sponsor's attention. It should be comprehensive but doesn't need to be complex.

Review and update the action plan in every scheduled meeting you have with your sponsor. The action plan should establish the agenda for your meeting so you can iterate on specific actions or decisions. During your meetings with the executive sponsor, get a sense of their time, capacity, and their preferred approach (detail oriented or big picture) that will help you craft the plan more effectively. The executive sponsor role is rarely, if ever, full time, so you need to respect their time and competing priorities.

Be particularly careful to ensure that the sponsor has enough information at the right level of detail to make decisions and understand their implications. Supplement your action plan with information that will help them get up to speed quickly on a decision or activity.

As an example, let's assume that your sponsor needs to approve a decision on when to upgrade. To prepare your sponsor, write an executive-level summary that includes what the upgrade will provide, the time and resources required, and the potential value the upgrade will have for your organization (along with your recommendation). Remember that your sponsor's primary job is to communicate, so be certain your materials support that. Continue to seek feedback on the right level of material needed by your executive sponsor to make decisions or support activities in your action plan.

If your executive sponsor changes, introduce your new sponsor to your current action plan and ask for feedback to adapt it to your new sponsor's needs and preferences.



**Create guiding principles with your sponsor.** One of the most powerful things you can do with your executive sponsor is to create a set of operating principles or golden rules you can communicate to your team and stakeholders to help guide their decision-making.

State these principles simply and briefly and don't be too restrictive – the goal is to establish and communicate your sponsor's expectations for how your implementation will progress. You can start with some of the examples below:

#### Project and implementation design

- We design and implement using out-of-the-box functionality, making sure we evaluate proposed configurations and customizations for business need.
- We make best use of ServiceNow capabilities to transform our processes and avoid changing the platform just to suit older ways of doing business.
- We design with a common user interface and a mobile-friendly strategy.

#### Data

- ServiceNow will become our single system of record for ITSM processes.
- We only feed data from trusted sources into ServiceNow.

#### Program

- Future development and releases will be guided by formalized demand management processes managed through ServiceNow.
- We will always upgrade to the latest version within two months of release, using automated testing and rapid deployment.

- 2. Identify potential roadblocks your executive sponsor should be prepared to address.** Your implementation may run into roadblocks that require actions or decisions from your sponsor. This includes project-specific risks, partner performance or relationship issues, or point-in-time escalations. Your sponsor's engagement at these points is critical, and can have outsized impact, so prepare them in advance.

First, compile and review a list of potential roadblocks and risks with your sponsor as part of your meeting cadence. Focus on "derailers" – roadblocks that will keep you from realizing milestones and objectives. Second, get clarity from your sponsor on specific roadblocks that they expect to be escalated and want to be involved in. You can also include recommendations for how your sponsor can help remove roadblocks as they come up.



**Reinforce the importance of championship.** Being an executive sponsor is not only about leading the vision and roadmap – it's also about being a [champion](#). The executive sponsor has to motivate team members and make sure they know that upper management values their efforts. In addition, the executive sponsor needs to promote your program's progress and reaffirm its importance to any critics. This is particularly important when problems occur, which is inevitable in large efforts.

## Step 4: Partner with your executive sponsor to optimize and expand ServiceNow adoption

After your initial implementation, begin to collaborate with your executive sponsor to identify opportunities and use cases for expanding ServiceNow across your organization. You can proactively look for business units where processes are not working well, largely manual, or just slow.

Your sponsor's role is to share their "ServiceNow story" with the leaders of these business units. Your executive sponsor isn't necessarily best positioned to identify potential use cases – that should be your role – but is best positioned to identify the most important business objectives held by peer executives. With a clear understanding of these objectives, you can begin to target expansion opportunities. Your sponsor, assuming they lead your strategic governance function, should review these opportunities as part of their ongoing oversight of your ServiceNow roadmap.

Part of this responsibility includes identifying and securing new executive sponsors as you expand. Here, your sponsor can help identify the best fit candidates for the sponsorship role, based on the criteria you defined in Step 1.

### Check your progress:

- Do you have a plan for your sponsor to champion ServiceNow to peer executives?
- Is your sponsor prepared to communicate your ServiceNow story?

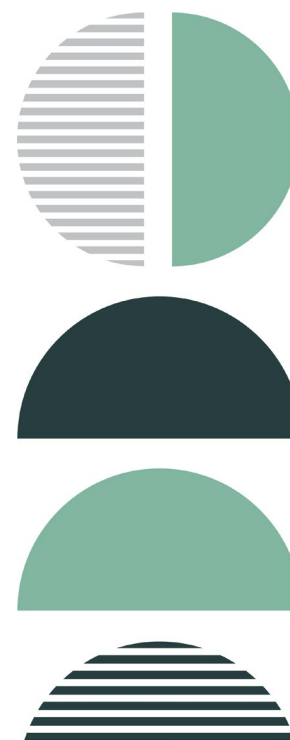
If you answered "yes" to each question above, you should have what you need for effective sponsorship. Revisit your steps as you expand or change sponsors.

If you answered "no" to either of the questions above, complete these action steps:

1. **Identify key stakeholders in other business areas or functions who may support expansion.** Focus your discussions with your executive sponsor on identifying outcomes in other business areas that can be addressed through ServiceNow. This can be a collaborative process, especially as you uncover potential use cases at a business-line level.

Second, identify the key stakeholders associated with those outcomes so your sponsor can approach them to champion use of the Now Platform. Consider building a stakeholder map including these and other roles:

- Human resources – CHRO; VP/director of HR
- Customer service – Chief customer officer; VP/director of customer service
- Procurement – Director of purchasing
- Facilities – Director of facilities
- Finance – CFO or VP/director of finance
- Legal – General counsel
- Sales and marketing – CSO, CMO, or director of marketing or sales operations
- Security – IT director or CISO (chief information security officer)



Your map can identify (a) the business outcomes held by each of these roles, (b) the opportunities or use cases these present for ServiceNow expansion, and (c) the stakeholder's knowledge of ServiceNow capabilities (whether they're 'out-of-the-box' products, like Customer Service Management, or no or low-code capabilities available on the Now Platform).

**2. Provide your executive sponsor with the resources to effectively evangelize the value provided by the Now Platform.**

Without the right tools and talking points, your executive sponsor may have difficulty influencing other decision-makers and evangelizing the potential value that ServiceNow can bring. Prepare your executive sponsor to explain digital workflows to peers, along with their potential to accelerate your organization's business outcomes.

Start by arming your sponsor with a clear story that includes data, anecdotes, and demo materials that show your success to date and connect your organization's business outcomes to new use cases for the Now Platform. Your story should:

- Use industry case studies to define your 'digital transformation opportunity'
- Demonstrate ServiceNow capabilities, with a focus on specific projects and success stories realized to date
- Identify clear business benefits, using tools like the [ServiceNow Value Calculator](#)
- Suggest use cases for a pilot, such as employee onboarding for HR

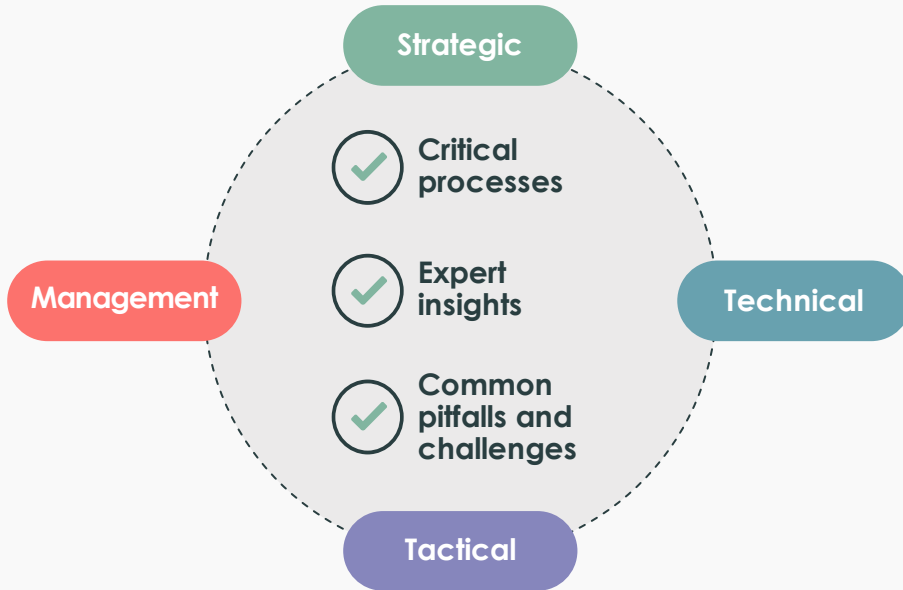
Our toolkit on how [create your transformation story](#) gives you a great headstart to help frame this story.

# Customer Success Best Practices


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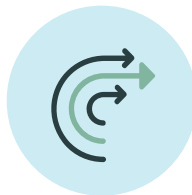


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