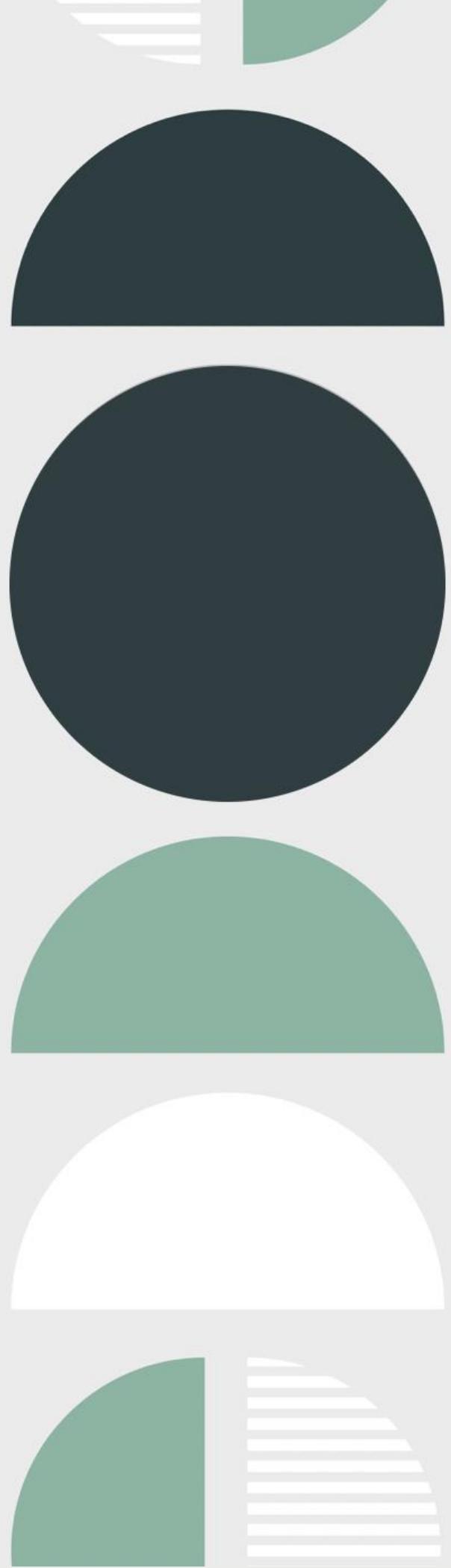


Field Service Management readiness

Developed by the ServiceNow Leading Practice
Center of Excellence

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What is Field Service Management?

ServiceNow® Field Service Management connects field service with other teams and mobile tools so you can quickly respond to and prevent issues. Using Field Service Management helps you make sure work is done the first time, maximizes uptime, and improves efficiency, empowering both your workers and your customers.

There are three common critical success factors among customers that have successfully implemented Field Service Management:

1. They're aware of key implementation risks and pitfalls and have a plan to prevent them.
2. They take the time to create an optimal design based on what they need the application for. Doing this helps them take advantage of new features in future releases.
3. They assemble a team with the right skills, including experience with ServiceNow's Field Service Management product, and at least one executive sponsor.

Who should read this workbook?

The implementation owner—who may be a primary business stakeholder, project manager, or other stakeholder who manages the project and decision-making process—uses this workbook when:

- A ServiceNow expert has provided a scoped plan and they're using this checklist to prepare

OR

- They don't have an implementation project plan yet and they're using this checklist to create one



What will this workbook help me do?

This readiness checklist **will**:

- Help you align with ServiceNow leading practices to expedite readiness and enhance the design phase
- Highlight the standard steps to prepare for implementation
- Outline the design phase homework
- Prepare you for some of the major decisions you'll make during implementation design
- Prepare you to understand the level of effort and complexity involved in creating a plan to collect and cleanse your data before you implement Field Service Management

This readiness checklist **will not**:

- Provide specific implementation guidance
 - For implementation planning and assistance, engage a [ServiceNow certified partner](#) or [ServiceNow Expert Services](#) if you don't have this expertise internally.
 - You can also find resources to support design, configuration, or testing activities through Now Create and the [Field Service Management Digital Foundations Success Pack](#).

How to use this workbook

This readiness checklist will guide you through the steps to get started with ServiceNow Field Service Management so you can be certain that the way you're using ServiceNow achieves your business objectives.

Start by reviewing the table of contents page showing each step. From there, proceed through the document to each section.

Hyperlinks are included throughout the document so you can navigate back and forth between the table of contents page and the different sections for each step.



Workbook Checklist:

Field Service Management readiness

Step 1: Confirm the prerequisites

- Review the Field Service Management functionality to make sure it aligns with your business objectives.
- Confirm the underlying platform health and functionality.
- Organize a team and collect your Field Service Management data.
- Work with an implementation team with ServiceNow Field Service Management expertise.

Step 2: Refine your vision, business objectives, and measures of success

- Document your key goals and identify the potential risks.
- Confirm how you'll measure and communicate your success.

Step 3: Assess your team's readiness

- Identify and prepare your team members.
- Confirm that your team has had the proper training.
- Make sure your team members are available during the project.

Step 4: Create a structure for governance

- Establish an implementation governance committee that's strategic and operational for Field Service Management.

Step 5: Plan your communications and user training

- Build a marketing plan to encourage adoption and explain the implementation's benefits.
- Build a training plan for all user types.

Step 6: Plan your implementation design

- Learn about your current processes and collect supporting documents.
- Document all required integrations.
- Identify the priorities for a phased approach.

Step 7: Follow the Now Create methodology

- Review the Now Create phases to help you maximize value throughout your implementation.

Step 1: Confirm the prerequisites

Take the time to understand Field Service Management's capabilities and features as you consider what you'll need to do to gain the value you expect from your implementation.

1. Review Field Service Management's functionality to ensure it aligns with your business objectives.

- Read the Field Service Management [overview](#) on the ServiceNow website. Take note of its features, functionality, and benefits. Work with your ServiceNow account team to learn what features and functionalities your existing licenses entitle you to and identify any additional capabilities you'll need to add.
- Review the Field Service Management [product docs](#). These resources are more technical and provide additional functionality detail.
- Take the [Field Service Management Fundamentals](#) course to better understand feature configuration and administration.
- Explore the [Field Service Management Community forum](#) for direct access to experts and peers.
- Review ServiceNow's guidance on the [ideal process map](#) for Field Service Management.

2. Confirm your underlying platform functionality and health.

- If you've deployed one previously, verify that your [CMDB is healthy](#) and that it has a known and active process owner.
- Answer these questions related to the CMDB:
 - Are we using a discovery tool to update the data in the CMDB?
 - Have we recently validated or updated the CMDB's inventories?
 - Have we mitigated the health issues we've identified on the CMDB Dashboard?
- Implement on the most recent release of ServiceNow whenever possible.
- Allow yourself and your teams the time to set up the core platform if you're a new ServiceNow customer.
- A CMDB deployment is best for maximizing value from the Now Platform®. But if your organization chooses an alternative database, make sure it's healthy and properly integrated with asset management systems. This makes it possible to tie work orders and work order tasks to your assets (like service parts or others) elsewhere in your environment.

3. Organize a team and your Field Service Management data.

- Appoint a Field Service Management process manager.
- Gain management support so you can obtain data from other stakeholders.
- Uncover all the places where your organization stores field service management data, whether in the CMDB, spreadsheets, and/or other databases.
- Identify all owners of the sources of your field service management data. Ask them to provide documentation to the process manager you chose.
- Clarify how your organization currently manages field service processes and tracks work orders.

4. Work with an implementation team with ServiceNow Field Service Management expertise.

- This checklist is for readiness only and doesn't provide design, configuration, or testing activities. Work with ServiceNow experts with advanced knowledge of Field Service Management processes and the app's technical properties. If you don't have this expertise internally, we recommend a [ServiceNow certified partner](#) or [ServiceNow Expert Services](#) for planning and assistance with execution.

Step 2: Refine your vision, business objectives, and measures of success

You need a vision, business objectives, and measures of success that reflect the value of your field service management program to influence stakeholder support. Make sure you have a snapshot of the metrics in your present state that you can use as a baseline to compare against after you implement.

1. Document your key goals and identify the potential risks.

- Consider and confirm your use cases for field service management, such as those for dynamic scheduling, dispatcher workspace, mobile agent, or contractor management.
- Use our [Success Checklist](#) to make sure your vision cascades into clear and measurable business outcomes.
- Work with your executive sponsor to develop your business outcomes. Here are some exemplary business outcomes as examples:
 - Boost customer satisfaction with transparent work order management.
 - Increase preventive maintenance to maximize uptime and minimize outages.
 - Increase field service agent efficiency and productivity.
 - Reduce information gaps to increase the probability of solving customer issues the first time.

2. Confirm how you'll measure and communicate your success.

- Make sure each KPI is not only measurable but easy to observe.
- Align with data engineering on the viability of the KPIs they'll have to support.
- Here are some exemplary KPIs to consider:
 - *% of agent utilization* – Track your agents' productivity over a given month or quarter.
 - *SLA compliance rates* – Track how well you meet your customer SLAs.
 - *Average closing time for work orders* – Track the end-to-end timeliness of intaking and closing work orders.
- Review this [comprehensive list of the most commonly used KPIs](#) for monitoring and improving services.

Step 3: Assess your team's readiness

To implement and maintain Field Service Management, involve multiple teams with specific, required skills. If you don't have the right team members in place, begin with a plan to engage them. *Don't* finalize your resourcing and project plans until you've assessed your team's readiness.

1. Identify and prepare your team members.

- Name a project manager for implementation. This person should be experienced with leading Field Service Management implementations and using agile methodologies.
- Confirm that your [executive sponsor](#) is committed and fully engaged.
- Confirm that your ServiceNow platform owner is committed and fully engaged. A senior manager to VP typically fills this role.
- Make sure that your existing approach and your organization is ready to fill the roles specific to Field Service Management:
 - **Administrator** – Manages the field service management data and controls and/or overrides all information in the Field Service Management application
 - **Service manager** – Manages the integrated team of initiators, qualifiers, dispatchers, and agents
 - **Initiator** – Creates work orders and assigns them to a qualification group
 - **Qualifier** – Ensures work order requests are comprehensive and creates work order tasks
 - **Dispatcher** – Schedules tasks, adds parts, and assigns tasks to agents
 - **Agent** – Manages the actual tasks and performs work onsite

If your organization uses contractors to perform work, you'll also need to fill need these roles:

- **Internal contractor manager** – Manages the contractor companies that tasks are outsourced to
- **External contractor manager** – Manages the contractor company and reviews and assigns tasks to external agents
- **External Agent** – Works on assigned, outsourced tasks

Note: Depending on your organizational structure, a single person or team may fill the initiator, qualifier, and dispatcher roles.

2. Confirm that your team has had the proper training.

- Your team needs to fill these roles with these skills:
 - **ServiceNow systems administrators** experienced in ServiceNow implementations and who've taken the [ServiceNow Fundamentals](#) course
 - **UAT and QC testers** with the appropriate testing skills
 - **Developers** with JavaScripting skills
- Most field service organizations are large—with thousands of FTEs—and so it may not be practical for each initiator, qualifier, or agent, for example, to take the recommended [Field Service Management Fundamentals](#) course. If this is your case, nominate two or three business process owners to represent each role. The nominees can take the fundamentals class and then train the rest of the team.
- Introduce system administrators and developers to [Now Learning](#) and [Now Creators](#) to encourage skills development.

- Consider training your team with the [Additional Recommended Courses for Field Service Management](#) learning path for additional skills when you're getting your organization ready for related capabilities.

3. Make sure your team members are available during the project.

- You won't know the estimated effort required or how many resources you'll need until the implementation scope and project plan are confirmed.



If you're engaging external ServiceNow experts for implementation, make sure your internal maintenance team is involved in the implementation design and configuration work so they can own and expand the platform after implementation.

Step 4: Create a structure for governance

Governance for your field service management practice should include implementation and post-implementation governance.

- **Implementation governance** supports a successful go-live.
- **Post-deployment governance** supports the long-term success of Field Service Management in your environment.

Before it disbands, your implementation governance team should identify a post-implementation governance team to ensure the Field Service Management program does not lose momentum.

1. Establish an implementation governance committee that's strategic and operational for Field Service Management.

- Include your designated ServiceNow platform owner, business process owners (e.g., Field Service Management process owner, Field Service Management service manager, Field Service Management administrator), project manager, and other business and technical stakeholders as required.
- Your executive sponsor should chair this committee.
- Define a meeting cadence, standard agenda, and decision-making process.
- The standard agenda includes:
 - Communicating project objectives that are clearly identified and prioritized
 - Reviewing measures of success for Field Service Management, IT and operations, and the larger enterprise
 - These measures of success for Field Service Management should come from the goals and metrics you discovered in [Step 2](#).
 - Listing organizational change management activities (communications and training) that support Field Service Management
 - Details are in [Step 5](#).
- Your governance committee will produce deliverables that will delineate:
 - Processes to prioritize known technical obstacles and strategies to resolve them
 - Standard demand intake and prioritization processes to review requests for new Field Service Management functionality
 - Policy documents defining asset purchasing, reclamation, and disposal
 - Additional policy documents required to support your specific business objectives and regulatory audit requirements



The governance structure you establish for implementation should set an initial baseline for the governance you'll need for a post go-live operating model, especially to manage demand. See our resources on [governance](#) for additional details.

Step 5: Plan your communications and user training

Consider how your organization will be affected by implementing Field Service Management. Some groups may perceive the change as negative, and it's important for them to understand the value Field Service Management brings to the organization.

1. Build a marketing plan to encourage adoption and explain the implementation's benefits.

- Confirm that you have leadership support and an executive sponsor for an organizational change management (OCM) program.
- Include budget for a program lead and/or ServiceNow expert support. Have the leadership team provide an explicit definition of the communications and training plans.
- Conduct a [readiness review](#) to measure how prepared your stakeholders are for the organizational change required to support Field Service Management. Do this *before* you hold your design discussions. Tailor the readiness review to your Field Service Management implementation.
- Use the [OCM Success resources](#) to create a plan and develop an impact analysis and risk assessment.
- Develop a communication strategy to make sure you use the best modes of communication for your audience.
- Establish a regular meeting cadence to keep the marketing plan on track.

2. Build a training plan for all user types.

- Create a training plan for end users (that is, your population of initiators, dispatchers, agents, etc.) so they're prepared to use the system at go-live. This is separate from the platform training for systems administrators and business process owners described in previous steps.
 - The business owners, usually in coordination with OCM representatives, can own and deliver this training for the rest of your end user population.
- Consider using ServiceNow [custom training and adoption assistance](#).

Step 6: Plan your implementation design

The implementation design process involves multiple teams, collaborative decision-making, and a thorough understanding of your current processes and technical environment. Because of this, it can often take weeks or longer to collect the necessary information, coordinate the right people, and solidify decisions during the design phase. When you follow the action items this step, you can proactively collect design-related information and initiate engagement with the required stakeholders. This will improve and speed up the design process.

If you're engaging a ServiceNow-certified partner or ServiceNow Expert Services to create an implementation project plan, provide the items in this section to enhance your project planning conversations. If preferred, complete this section with your services partner.

1. Learn about your current processes and collect supporting documents.

- Capture how your field service organization is structured according to role, group, and geographic location.
- Map out the field service experience as it exists today, from initiating a work order to dispatching subsequent work order tasks to the agent closing them. Document the processes for request intake, qualification, scheduling and dispatch, and inventory storage and procurement.
- Make sure you understand the business logic for dispatching activities, especially the logic for groups, territories, skills, and other ways of ranking agents and technicians.
- Document the states related to work orders and work order tasks. Then identify those states that don't align with your existing processes. Don't alter the out-of-the-box state configurations unless you specifically design for those alterations in mind. Otherwise, you could have significant implementation issues.
- Document how your organization categorizes requests (internal, external, or both). Also document the criteria for any field service management you outsource.
- If you have contractors for outsourced field service management work, document the process for onboarding them.

2. Document the required integrations.

- Get to know your data strategy and what data you'll need to migrate and integrate for Field Service Management.
- Review these [typical integration options](#) and their various use cases.
- Identify other enterprise applications you use that impact the Field Service Management workflows, specifically applications related to inventory management, order management, invoicing, IoT devices, CRM, and ERP.
- Prepare for integrations with real-time mapping services, such as [Google Maps API](#).
- Determine whether you'll need to migrate existing case history or knowledge articles from another system into Field Service Management.

3. Identify the priorities for a phased approach.

- Deploy Field Service Management to a single geography or group first to assess gaps in technology and process. Ask for specific feedback to help you mitigate risks in the general rollout.
- Limit feature creep in the pilot. Start with core Field Service Management processes before you roll out more advanced capabilities, such as [Performance Analytics](#), [Predictive Intelligence](#), and [Virtual Agent](#).

Step 7: Follow the Now Create methodology

Now Create includes the critical steps that project managers need to execute for Field Service Management implementation projects. The methodology includes prescriptive guidance, associated assets, and other resources. Take a look at Now Create's [digital foundations for Field Service Management](#).

1. Review the Now Create phases to help you maximize value throughout your implementation.

- Initiate
 - Understand your business objectives
 - Establish program governance
 - Establish the project team
 - Formally kick off the project
- Plan
 - Conduct process, platform, and integration workshops
 - Define, review, and prioritize the product backlog
 - Plan your release
 - Finalize the project timeline
 - Document the test strategy
 - Set up the environment
- Execute
 - Run agile scrum cycles
 - Define your support processes and Hypercare approach
 - Hold communications and awareness roadshows
 - Plan for system testing and UAT
- Deliver
 - Perform UAT and system testing
 - Plan your go-live
 - Observe operational readiness
 - Hold training
 - Go live
- Close
 - Hand over operations
 - Provide Hypercare support
 - Review lessons learned
 - Measure value and champion success
 - Formally close the project