Set up a technical governance board to lead technical governance

Technical governance, led by a technical governance board, governs the management and stability of the ServiceNow support model. Start by defining who must be involved in technical decisions for ServiceNow, then define how this group makes informed decisions.

Check your progress:

❑ Do you have a group of leaders who meet periodically to make technical decisions about how to manage the Now Platform and guide implementation?

❑ Does this group have a defined remit that bounds what types of decisions they need to be involved in?

❑ Does this group apply a consistent decision-making process?

If you did not answer "yes" to all questions above, complete these action steps:

1. **Recruit someone to chair the technical governance board.**

   Establish a technical governance board, led by the ServiceNow platform architect and/or platform owner, to oversee technical governance.

2. **Set a charter for your technical governance board.**

   We recommend that the technical governance board aspire to:

   • Be the decision body and gate keeper on platform-related technical aspects

   • Assess technical and design options and approaches

   • Assess development standards, best fit usage, UI standards, data governance/strategy are among the tools used by this group

3. **Work with your chair to recruit other stakeholders to the board.**

   One of the most important steps in establishing technical governance is to define who needs to be directly involved in decision-making processes that determine technical standards for how the platform is used and managed. Take great care when you select who should participate in these decisions. Keep the board as small as possible to start.

   Consider asking the following roles to participate in technical governance board decision-making:

   • Platform architect

   • Platform owner

   • IT domain owners

   • Program manager(s)

   • Business analysts

   • Quality assurance lead

   • Security/compliance lead

   • Development lead

   • User experience lead

4. Define what decisions and responsibilities need to be managed by the technical governance board.

Consider what outcomes you expect from your board. Then make a list of decisions and actions that your technical governance board will be responsible for.

To start, here are some decisions the technical governance board needs to make:

- How should we manage the technical aspects of implementations and upgrades?

- What technical standards should we adhere to for engineering, development, and integration?

Here's an example of how you can structure what you define, using a template we've used while working with other customers. Note that the output of action steps 1–3 can also be included in this template.

Technical governance board

Charter	Members	Responsibilities & Decisions	Outcomes	Typical Agenda
• Be the decision body and gate keeper on platform related technical aspects. • Assess technical and design options and approaches. • Assess development standards, best fit usage, UI standards, data governance/ strategy are among the tools used by this group.	• Platform architect (lead) • Platform owner • Development leads (each project) • Platform lead administrator Optional / guests: • Security lead • Interface owner (source/ target system) • Project manager(s) • Vendor (ServiceNow) architect	• Decision body and gate keeper on platform related technical aspects • Design authority on platform customizations and integrations • Maintain design decision register of approved, rejected design decisions • Maintain technical debt register for periodic review and removal of technical debt • Provides advisory and recommendations to the program steering committee & project(s) • Enforcement of platform quality and upgradability • Advisory for projects, operations and executive boards	• Approvals for solution designs • Guidance on requests for technical support from projects • Technical design approvals for customizations and integrations • Approve & review plugin enablement on each instance • Decisions on requests that have an impact on the platform	• Review technical requests • Evaluation of new demands / stories / requirements • Evaluation of requirements • Review of release content (technical review) • Technical release approval • Release planning recommendations to steering committee • Approvals on platform wide aspects • Review high / critical incidents that were addressed to the CAB (change advisory board)

5. Set a cadence for technical governance board meetings.

We recommend that the technical governance board meet at least every 1–2 months. However, they will also need to convene for point-in-time decision-making as needed (e.g., to handle an issue or question elevated from implementation teams so they can stay on schedule).

6. **Define specifically how the technical governance board will make decisions.**

   Define a process for how your board will make governance decisions. Make sure your process explicitly prioritizes the most important action items from your backlog.

   Consider whether decisions are made by majority-rules voting, consensus, seniority, or some other mechanism.

7. **Plan how to support your technical governance board's decision-making.**

   It isn't enough to just get the right leaders in the same room. You need to plan for how you will prepare your board to focus on the right priorities when they meet. Plan for how you can do the following items before and during each board meeting:

   • Set an agenda – Maintain a backlog of the items that your board needs to discuss during their next meeting. Prioritize these items to ensure that the most important and urgent needs are addressed.

   • Provide relevant information so your board can make informed decisions. For the technical governance board, this information can include:

        o Project plans for ongoing work

        o Most up-to-date ServiceNow performance dashboard reports

        o Reports from <u>ServiceNow HealthScan</u> and <u>Instance Security Center</u> – insight from these tools can help your board monitor compliance with technical governance and identify areas that need improvement

        o Notes from past board meetings, including those from other boards (i.e. the executive steering board and/or demand board)

   • Take meeting notes to record decisions made by the board so they can be articulated into policies that your organization can follow, as needed.

<u>See full ServiceNow governance success workbook</u>