

## Set up a demand board to lead portfolio governance

Portfolio governance, led by a demand board, collects and prioritizes requests for ServiceNow projects and enhancements and creates a roadmap that aligns with the vision set by your executive steering board. Start by defining who must be involved in portfolio 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 portfolio decisions about how to prioritize and sequence Now Platform implementations and enhancements?
- 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 demand board.

Establish a demand board, led by the demand manager and/or platform owner, to oversee portfolio governance.

### 2. Set a charter for you demand board.

We recommend that the demand board aspire to:

- Assess platform demand against strategic roadmap and guiding principles to ensure demand has best fit usage on the platform
- Assess effort estimation and design options in order to approve viable demands that provide value to the customer

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

One of the most important steps in establishing portfolio governance is to define who needs to be directly involved in decision-making processes that manage your ServiceNow portfolio. 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 demand board decision-making:

- Platform architect
- Platform owner
- IT process/domain owners
- Portfolio/service owners
- Demand managers
- Program manager
- Business analysts
- Vendor managers
- Key suppliers and partners



**4. Define what decisions and responsibilities need to be managed by the demand board.**

Consider what outcomes you expect from your board. Then make a list of decisions and actions that your demand board needs to consider.

To start, here are the most important decisions the demand board needs to make:

- How do we determine the prioritization criteria for demands for new capabilities, functionality, configuration, and customization?
- How do we use these criteria to govern demand intake?
- How do we delegate approvals for low-risk changes?

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

**Demand board**

Charter	Members	Responsibilities & Decisions	Outcomes	Typical Agenda
<ul style="list-style-type: none"> <li>• Assess platform demand against strategic roadmap and guiding principles to ensure demand has best fit usage on the platform.</li> <li>• Assess effort estimation and design options in order to approve viable demands that provide value to the customer.</li> </ul>	<ul style="list-style-type: none"> <li>• Platform owner</li> <li>• Project manager(s) (current Projects)</li> <li>• Process manager(s)</li> <li>• Platform architect</li> <li>• Platform demand manager (may be combined with another platform role)</li> </ul>	<ul style="list-style-type: none"> <li>• Assess platform demand against strategic roadmap and guiding principles to ensure demand has best fit usage on the platform.</li> <li>• Assess effort estimation and design options in order to approve viable demands that provide value to the customer</li> </ul>	<ul style="list-style-type: none"> <li>• Provide decisions on all demand and associated components</li> <li>• Strategy fit – falls within the functional areas of ServiceNow</li> <li>• Service fit – requires only out of the box functionality to meet business needs</li> <li>• Customization assessment required by design review board</li> <li>• Business case – existing case for change and value proposition meets business needs</li> <li>• Effort estimation</li> <li>• Address conditional actions to be completed</li> <li>• Assist in story creation post design decision has been reached</li> </ul>	<ul style="list-style-type: none"> <li>• Review demand items that have been flagged for the review</li> <li>• Run through presented demand design options</li> <li>• Agree on design decisions                             <ul style="list-style-type: none"> <li>• Pending</li> <li>• Rejected</li> <li>• Approved</li> <li>• Approved with conditional actions</li> </ul> </li> <li>• Address conditional actions and follow-up items</li> </ul>

**5. Set a cadence for demand board meetings.**

We recommend that the demand board meet every 1–2 months, at least.

**6. Define specifically how the demand 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 demand 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 demand board, this information can include:
  - Project plans for ongoing work.
  - Most up-to-date ServiceNow performance dashboard reports
  - Notes from past board meetings, including those from other boards (i.e. the executive steering board and/or technical governance 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.



**Practitioner insight: Partner with enterprise architect (EA) teams to shape demand for ServiceNow. Once you've defined how to govern your ServiceNow portfolio and reactively manage demand, you can start working to anticipate, or even proactively shape, demand for the Now Platform.**

Demand shaping involves educating business partners and other enterprise governance groups on what your ServiceNow implementation can deliver so they know when ServiceNow is the right platform to use to fulfill certain business needs. When done well, your demand shaping efforts will lead to better informed, and often more, demand for ServiceNow, which will strengthen ServiceNow's position as a strategic platform at your organization.

The demand board plays a critical role in demand shaping because it's best positioned to define and share best-fit guidance (i.e., when to use ServiceNow versus other platforms) to other groups.

To start shaping demand, we recommend that the demand board partner with EA teams to define and share best fit usage guidelines for their ServiceNow implementation. Here are some starter guidelines you can consider.

#### ServiceNow fit

**ServiceNow digital workflows can transform manual processes that span multiple systems where development is slow and functionality isn't reusable, relies on complex infrastructure, and presents legacy experiences.**

##### Good fit

- Extensive use of forms to interact with data (service catalog, mobile)
- Automation of a manual and repeatable business process
- New tables and table inheritance
- Workflow
- Data lookup
- Single portal
- Machine learning
- REST APIs
- Data can be modeled in a relation database
- Requires reporting and analytics capabilities
- Extensible and/or reusable

##### Bad fit

- One-time tasks
- Data is unstructured or analog
- Requires access to proprietary libraries that do not have an API
- Applications requiring graphics engines
- Applications with no process flow
- Document storage or enterprise content management
- Complex calculations
- High-compute resources (like blockchain applications)

When you've defined the best-fit guidelines for your specific implementation, ask your EA partners to keep them in mind as they help other groups decide what platform to use to support their business needs. You can also share these guidelines with your executive sponsor and executive steering board, so they can refer to them when talking to other business leaders about ServiceNow.