Define how to identify and escalate decision-making needs

Most demand for decision-making will come from outside of your governance board structure—from people and teams that are working on the Now Platform. For example, a process owner implementing on the platform may need to escalate a decision about how to design the process they're implementing because it could impact platform architecture or how other, already-implemented processes will work. To support this, you need to map how these requests escalate to your boards.

Check your progress:

❑ Do you know every step in the escalation process, from individual contributors on your platform support team up to full governance boards?

If you did not answer "yes" to the question above, complete these action steps:

1. **Make sure that all implemented products (or implementation projects) have assigned process and service owners.**
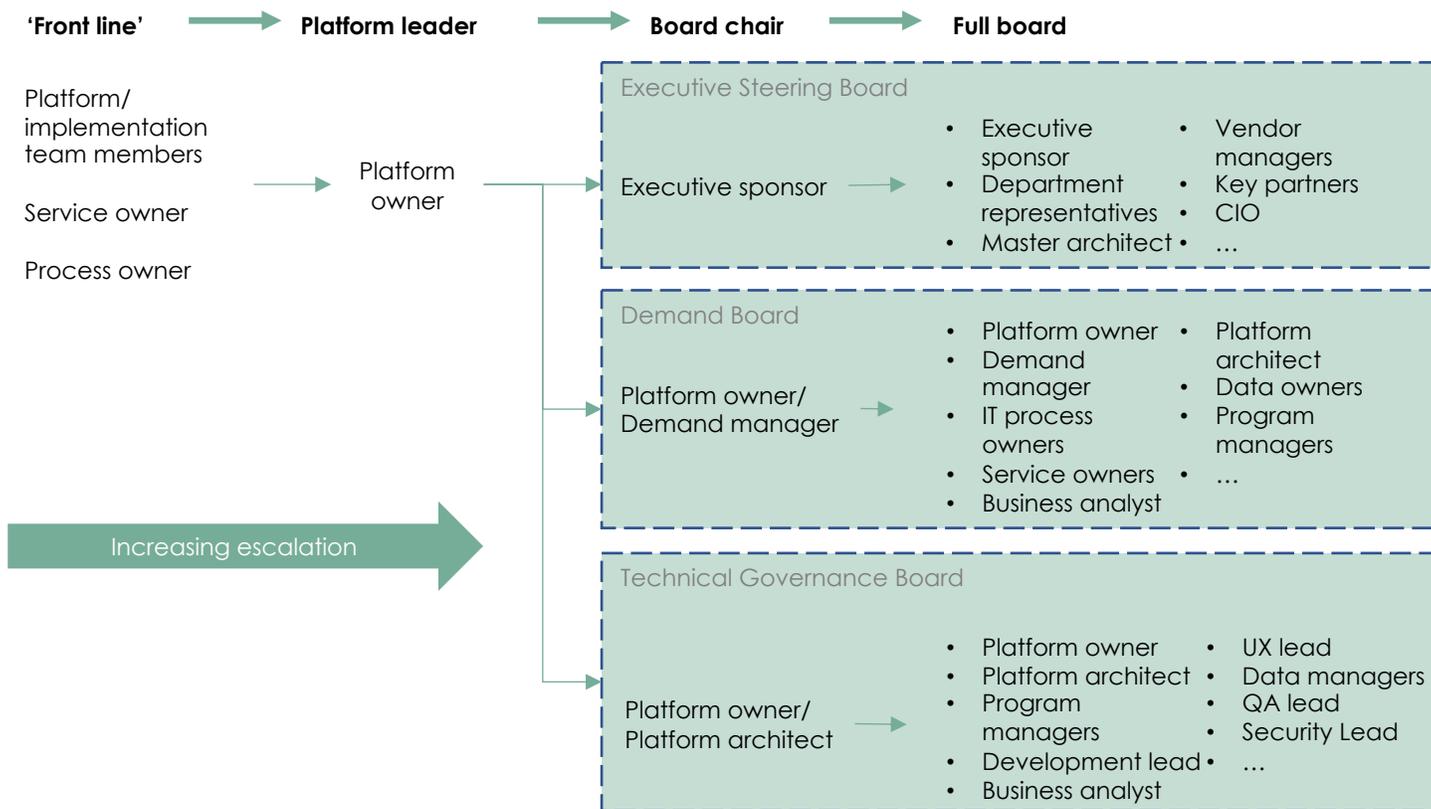
   Process and service owners are key leaders on the front line and, along with your Now Platform architects and platform owner, they're positioned to identify issues and questions that merit escalation and to hand those needs up the chain of authority to be considered by your governance boards.
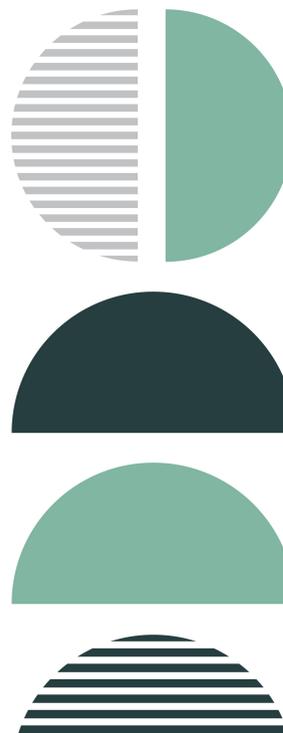
2. **Define how implementation and project decisions escalate from process/service owners to governance boards.**

   Your escalation path acts like an intake model with multiple "gates" to deflect needs from requiring the attention of your full boards when possible. This process flow will inform what needs to be covered during regularly scheduled board meetings and prompt a decision-making process outside of the regular cadence—for example, when a need is so urgent that it cannot wait for the next scheduled meeting.

   We recommend mapping this flow visually. Start with this map and modify if needed.

'Front line' → **Platform leader** → **Board chair** → **Full board**

Platform/
implementation
team members

Service owner

Process owner

→ Platform owner

Increasing escalation →

Executive Steering Board

Executive sponsor →
- Executive sponsor
- Department representatives
- Master architect
- Vendor managers
- Key partners
- CIO
- …

Demand Board

Platform owner/
Demand manager →
- Platform owner
- Demand manager
- IT process owners
- Service owners
- Business analyst
- Platform architect
- Data owners
- Program managers
- …

Technical Governance Board

Platform owner/
Platform architect →
- Platform owner
- Platform architect
- Program managers
- Development lead
- Business analyst
- UX lead
- Data managers
- QA lead
- Security Lead
- …

In this model, the platform owner is the first point of escalation. If they judge that they can't make a final decision on the issue, they decide which governance board to escalate the question to.

We recommend distinguishing multiple levels of escalation within your governance boards. The platform owner should start by directing questions to the relevant board lead. The board lead should only escalate the question to their full board when they can't make a decision without consulting others on their board. When this happens, the lead can decide to either escalate the need immediately or add the question to the agenda for the board's next regularly scheduled meeting.

This structure is faster and less burdensome because it enables some decision-making without the full board.

Practitioner insight: Don't escalate the same question to more than one board at a time, even when it may be relevant to multiple boards.

Escalate first to just one board based on which you think is best positioned to start addressing the specific need. Then rely on your boards to collaborate as needed. For example, a process change may require input from all three boards, but it makes the most sense to first escalate only to your demand board where your process owners sit.

See full ServiceNow governance success workbook