Define technical governance policies and standards that define how the Now Platform should be managed

Good governance should deliver a minimally sufficient set of policies that inform and govern how work is best done with ServiceNow to drive business value. Your initial set of policies will set a precedent—recording decisions made by your governance authorities so they can be followed across your entire organization.

Your policies should provide detailed guidelines and technical standards that teams can follow to do work according to established practices. They must also align with your overall golden rules—in fact, policies often expand on your golden rules to more granularly explain the guidance and guardrails you need.

Check your progress:

- Have you documented a set of specific technical policies that define how things like instance management, upgrades, and security are handled according to established best practices at your organization?
- Do these policies effectively inform work at your organization?

If you did not answer “yes” to both questions above, complete these action steps:

1. **Define a minimum viable set of technical governance policies.**

   Conduct a thorough review of product documentation and release notes to identify what platform/technical governance policies may be needed. Then consult with your administrators, developers, fulfillers, and process owners using workshops and tabletop exercises where needed to identify key points where your platform/technical governance needs clear definition.

   Based on what you learned, define a minimum viable set of governance policies—an initial set of draft policies—that will help you avoid technical risks while they guide work on your ServiceNow implementation.

   This will help you deliver governance value quickly and avoid maturing any one type of governance policy (like “perfecting” the instance management policy) before considering the full set of different policies you need to govern ServiceNow.

   A minimum viable set of policies could include:

   - **Platform management policy** – Defines a process to evaluate and mitigate the impact of changes in your ServiceNow instances to maintain platform stability and integrity
   - **Instance management policy** – Defines how to right-size environments, replicate instances correctly, develop a security access control model, and ensure proper maintenance
   - **Upgrade management policy** – Defines how to plan for and execute upgrades, including a policy that regulates customizations that could hinder future upgrades
   - **Platform data governance policies** – Defines data ownership and stewardship roles, sets up data standards and establishes a data dictionary with field descriptions, and manages data synchronization
   - **Demand management policy** – Defines how demands—that is, requests for new services or for changes to existing services—are evaluated and prioritized relative to the business value they provide before resources are allocated. This policy should be aligned with established demand intake and management practices, if they’re already established in your organization.
Practitioner Insight: Start by defining the extent and degree of control you need to enforce via policy before defining any policy. The extent of control refers to the number of things that need to be regulated by policy. The degree of control refers to how strictly that policy needs to regulate action. Your goal should be to settle on the smallest extent and degree of control possible. Doing this first makes it far easier to assemble a minimum viable set of policies that will protect you against risk and inform your work—without going overboard.

Bear in mind that the extent and degree of control you establish through governance should match your organization’s risk tolerance level and not try to avoid risk beyond that. Don’t try to completely avoid risk—it’s not possible and attempts to do so often result in overly rigid policies that hinder work.

Practitioner Insight: Explore what other work or policy exists that’s relevant to ServiceNow governance first, even if it wasn’t defined explicitly for ServiceNow

A few minor alterations or additional considerations might make an existing process or policy work well for ServiceNow governance needs, saving time and causing less change from your established protocols. Always opt to adopt or adapt an existing policy when it’s reasonable, but critically examine that policy first.

If an existing policy accomplishes exactly what you need (or can be slightly modified to do so), don’t waste time reinventing the wheel. Otherwise, when you develop a new policy that will better support your ServiceNow-specific needs, make sure it doesn’t contradict with any existing policy.

2. Share your technical policies with all relevant audiences (e.g., all governance boards, Now Platform support team members, etc.).

Communicate your expectation that everyone will follow the guidance in your policies whenever working on the Now Platform. Store these documented policies in a central location where all relevant stakeholders can find and review them whenever needed (e.g., a department SharePoint on in knowledge management articles).

Practitioner Insight: Make sure your organizational change management plan supports your governance decisions. A best-in-class governance structure can craft value-adding policies but still not generate positive change. Why? As with most things, you need to effectively communicate your work and sell your organization on the value it provides.

Without marketing the good work you’re doing, it’s possible that people in your organization will “miss the memo” and continue to do things the way they always have. Harder still, you need to convince people that it’s in their best interest to follow the guidelines set in governance policy, so they don’t circumvent governance or perceive it as a roadblock.

Consider how you’ll deliver new governance policies in a way that your organization will recognize and follow. Be open and communicate the decisions your governance authorities make. Focus your messaging on the new value that policies will enable. One ServiceNow customer advises that it can be helpful to think about this as managing the organizational change caused by establishing new governance. Your plan for organizational change management should account for this, particularly in your communications plan.

It’s always worth the time to use these communications as opportunities to educate stakeholders on both the value of governance and on the value of ServiceNow. Make communication planning related to new decisions and policies a part of every board meeting.

See full ServiceNow governance success workbook