Get started with ServiceNow governance

Developed by the ServiceNow Best Practice Center of Excellence

August 2020
What is ServiceNow governance?

Governance is a decision-making framework that defines how ServiceNow® strategy, portfolio, and technical decisions are made and who has the authority to make them.

ServiceNow recommends a governance model with three governance boards, each specializing in one type of decision-making (i.e. strategy, portfolio, or technical).

Good governance streamlines the decision-making needed to clearly define how your organization should use and manage the Now Platform.

What’s the difference between my strategy, my operating model, and my governance?

Your strategy describes what you will do, in terms of both:

• The business outcomes and value you plan to capture
• The ServiceNow workflows you’ll implement to realize outcomes and value

Your executive sponsor and/or Center of Excellence and Innovation leader should set and approve your strategy.

Your operating model shows how you will realize your business outcomes. It describes the capabilities you need to create and deliver value using the digital workflows you implement on the Now Platform.

Your governance model provides the decision-making rigor and clarity you need to make sure that your operating model works within the constraints of your business strategy and technical environment.
Why should I invest in governance?

You’ll need to make many decisions as you implement and manage the Now Platform, like:

• What services to deliver using ServiceNow
• How to sequence implementations
• How to manage upgrades
• When to customize as opposed to adopt out-of-the-box (OOTB) functionality

The point of governance is to structure and streamline how your organization makes decisions like these, without frequent, chaotic, and ad hoc escalations to senior leadership.

Good ServiceNow governance will:

• **Drive your transformation vision** – Effective decision-making avoids wasted effort and prioritizes high-value projects by aligning ServiceNow strategy and investment decisions with your broader enterprise goals.
• **Deliver outcomes faster** – Governance helps your organization get the right work done faster by providing clear direction to teams that implement and manage ServiceNow at your organization.
• **Minimize technical and business risk** – Governance is key to how you define and apply technical best practices to minimize risk and maintain platform integrity.

What will this workbook help me do?

When you complete the steps in this workbook, you’ll have ServiceNow governance that:

• Structures how your decision-making groups (i.e. governance boards) make informed decisions that guide how you deliver value with the Now Platform;
• Ensures that ServiceNow projects and investments align with your strategy, oversees how you manage your ServiceNow portfolio, and defines what policies must be followed to ensure platform stability;
• Improves over time – by measuring and improving governance process efficiency – to ensure that governance delivers value without becoming burdensome ‘red tape’.

How to use this Success Workbook

This workbook will guide you through the steps to get started with ServiceNow governance.

Start by reading through the Workbook Checklist and review the steps and tasks to get started with ServiceNow governance. From the checklist page, you can either proceed through the workbook page by page or navigate only to the sections that you need using the hyperlinks.

Each section includes “check your progress” questions that you can answer to test whether you need to complete the tasks listed on that page or if you’ve already done so and should move forward. Hyperlinks are included throughout the workbook so you can navigate back and forth between the checklist page and different sections.
Workbook Checklist: Get started with ServiceNow governance

Step 1: Prepare to implement ServiceNow governance
- Assign someone to design your governance program and coordinate its implementation
- Understand the technology governance requirements at your organization
- Build a project plan for how you’ll implement ServiceNow governance at your organization, defining your governance vision, intended scope, and a setup timeline
- Gain executive sponsorship for governance, using your project plan and a business case
- Engage stakeholders that should be involved in implementing governance

Step 2: Build your governance model
- Set up an executive steering board to support strategic decision-making
- Set up a technical governance board to support technical decision-making needs
- Setup a demand board to make portfolio management decisions
- Define how information flows to and across governance boards to inform decision-making
- Define how decision-making needs are identified and can escalate, from front-line, “hands-on-keyboards” teams to governance boards

Step 3: Define your governance policies
- Define a set of principles or golden rules, to inform early decision-making and policies across different governance groups
- Define a minimum viable set of technical governance policies that define how the Now Platform should be managed

Step 4: Build a plan for continuously improving governance
- Set metrics to measure the effectiveness of governance at your organization
- Continually assess and improve governance performance
Step 1a: Assign someone to design your governance program and coordinate its implementation

Your governance program will define how your organization makes the decisions that will guide your ServiceNow implementation. Getting this right requires careful program planning and design from the start. This is best managed by assigning overall accountability for governance implementation to a single leader.

Check your progress:
- Is someone accountable for implementing ServiceNow governance?
- Is this person a leader with the right authority and experience to effectively lead governance design and implementation?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. Assign accountability for designing your governance program and coordinating its implementation to a single person

   This person will be accountable for completing the steps in this document, including:
   - Leading in defining the scope, direction, and goals for your governance program
   - Designing a project plan for implementing ServiceNow governance
   - Identifying and engaging people that need to be involved in implementation

   Platform owners are typically best positioned to fulfill the responsibilities listed above.

   If the platform owner needs additional help, they should first recruit a program manager to support planning and coordination and then involve others only as needed.

   Practitioner insight: Make sure the people tasked with setting up governance understand the non-technical elements of ServiceNow governance

   Your Now Platform owner usually has both the technical and strategic perspectives required to set up an effective governance program that extends beyond basic platform management. Involve other people with experience in strategic planning and who understand the business challenges as needed, if the platform owner in your organization is primarily technically focused. Platform architects and business analysts, for example, usually have the experience and know-how to provide this business perspective.

Return to workbook checklist
Step 1b: Understand technology governance requirements at your organization

Most organizations have an existing technology governance model. While the scope of ServiceNow governance is limited to governing the Now Platform, it’s critical that your approach fits with any existing technology governance requirements. For example, how will strategic decisions about how to use ServiceNow need to consider prevailing enterprise platform strategy? How does a ServiceNow-specific demand process align with the existing demand management process at your organization? How should ServiceNow be managed according to enterprise-wide architecture and security requirements?

This is especially important in organizations where ServiceNow is a strategic platform and/or when ServiceNow is highly integrated with other platforms. It’s critical that you understand this context before you start designing and implementing ServiceNow-specific governance.

Check your progress:
- Do I know about all relevant existing governance and compliance requirements in my organization?
- Do I know how to align ServiceNow governance design with our existing technology governance model?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Identify any existing technology governance model requirements and/or policies that should be considered when designing your ServiceNow governance approach.**
   
   Learn about your organization’s technology governance policies, requirements, and governance bodies/structure so that you know how to align your implementation of ServiceNow governance. Note specific policies that should be considered when defining your own ServiceNow-specific policies later on.

2. **Make a list of anything you learned about technology governance at your organization that you should keep in mind as you design and implement your ServiceNow governance model.**
   
   For example, does your organization use specific terminologies that you should adopt instead of the terms used in this workbook? Are there restrictions or design guidelines for how to set up new governance models at your organization? Consult with technology governance experts at your organization (typically in your enterprise architecture function) for guidance.
Practitioner insight: Consider how your organization’s decision-making culture should influence how you structure decision-making for ServiceNow

Your organization’s culture should also influence how you design and position your ServiceNow governance approach to ensure it’s most likely to be accepted and followed. For example, if your organization is process oriented and has experience with governance, it might appreciate a more detailed and rigid structure up front because it’s easier to follow and strictly adhere to. If governance is a newer concept, you may opt to ease into governance more slowly to avoid it being criticized as red tape.
Step 1c: Build a project plan for how you’ll implement ServiceNow governance at your organization

Approach implementing governance with a similar rigor that you apply to technical implementations. Set goals and make a plan.

Check your progress:

- Is there a defined vision for what ServiceNow governance will deliver?
- Is there a project plan with a defined timeline for implementing ServiceNow governance?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Define a vision statement for what ServiceNow governance will deliver at your organization.**
   
   We suggest something like “ServiceNow governance will simplify decision-making to accelerate platform implementation and outcomes by defining how the right people can effectively make the right decisions.”

2. **Document your project plan for implementing governance.**
   
   Define specific steps for how you will implement governance, following at least the steps included in this workbook. Set a timeline with deadlines for each step. Use this governance project plan template, organized using the same tasks as this workbook, to get started.

<table>
<thead>
<tr>
<th>Task</th>
<th>Assigned to</th>
<th>Start date</th>
<th>End date</th>
<th>Duration</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign someone to design your governance program and coordinate its implementation</td>
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<tr>
<td>Research how decisions are made at your organization</td>
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<tr>
<td>Build a project plan for how you’ll implement ServiceNow governance at your organization</td>
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<tr>
<td>Gain executive sponsorship for governance</td>
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<tr>
<td>Engage stakeholders that should be involved in implementing governance</td>
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**Return to workbook checklist**
Step 1d: Gain executive sponsorship for governance

You need leadership support to get started with ServiceNow governance. Find leaders who understand the value of governance and will help you establish it at your organization, starting with your executive sponsor.

Check your progress:

- Have you built a business case that explains why governance is worth implementing?
- Have you shared this business case with your executive sponsor and gotten their support?
- Has your executive sponsor gotten their peer leaders to also support your case?

If you answered “yes” to all questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Build a business case for why your organization needs ServiceNow governance.**
   
   Leaders understand and respect business cases, and a well-structured case can very effectively deliver your pitch for governance. You can do this in two ways:
   
   - First, clearly articulate the outcomes you expect from implementing governance. We often cite that governance can “help drive your transformation vision by aligning all ServiceNow investments to support strategy, deliver the right work at the right time by streamlining decisions and removing roadblocks, and maintain the integrity of your ServiceNow implementation by defining and applying technical best practices.”
   
   - Second, tell stories of previous issues that exemplify the cost of not having structured decision-making (e.g., delayed projects because of escalation roadblocks).

   Simple, clear, “back-of-the-envelope” calculations on the value of governance, supported by stories from previous projects, can help you make your case.

2. **Present your project plan and business case to your executive sponsor, ask for their support.**

3. **Support your executive sponsor’s efforts to gain wider executive buy-in and support for ServiceNow governance.**

   Arm your executive sponsor with your business case, project plan, and any other supporting resources they ask for so they can be effective advocates for your ServiceNow governance implementation. Refer to this playbook on how to work with your executive sponsor, if needed.

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Step 1e: Engage stakeholders who should be involved in implementing governance

Conduct a stakeholder analysis to identify what roles and groups should be involved in establishing ServiceNow governance and how they’ll contribute. This analysis often reveals both who you’ll need to work with directly in order to set up governance and who will need to be involved in ServiceNow governance functions once they’re established.

Check your progress:

- Do I know everyone who should be involved in implementing governance?
- Have I defined how each stakeholder should contribute to implementation?
- Have I spoken to each stakeholder and set expectations with them?

If you answered “yes” to all questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Identify who should be involved in implementing ServiceNow governance.**
   Make a list of the groups you identify. This list will be different at every organization but will generally involve at least someone from these groups:
   - ServiceNow executive sponsor
   - ServiceNow platform team
   - IT/domain leaders
   - Service and process owners
   - Program managers (PMO)
   - Enterprise architects
   - Information security team

Practitioner insight: Involve people with both technical and business skills when you set up your governance program

All too often, organizations think of governance only in terms of controlling what happens on the technology—and then they design a governance program that focuses only on technical standards and management. The consequence is that the responsibility for setting up governance often defaults to the staff with technical skills.

But if your organization is looking for transformation, the most important governance decisions to frame aren’t technical—they’re about the strategic direction of the ServiceNow roadmap and how technical decisions align with and support that. The people who design and set up your governance program need to balance an understanding of business as well as technical needs.
2. **Build a stakeholder map that shows who needs to be involved in setting up ServiceNow governance and what they can contribute.**

   Your platform owner (and any others working to set up ServiceNow governance) must coordinate with other groups to ensure your ServiceNow governance program fits within the context of existing enterprise governance and policies. Unfortunately, many groups overlook this need because they don’t have a strong sense of whom to involve and how to work with them. To avoid this, brainstorm a list of stakeholders who might need to be involved when you initially set up ServiceNow governance.

   Map these different stakeholder groups—such as your executive sponsor, the PMO, and process owners—and define what you think each stakeholder can help contribute to your governance program. The map will be different at every organization but will generally involve at least the groups and tasks included here:

<table>
<thead>
<tr>
<th>Governance setup role(s) (e.g. Platform Owner)</th>
<th>ServiceNow executive sponsor</th>
<th>Program manager (PMO)</th>
<th>ServiceNow platform team</th>
<th>Service owners</th>
<th>Process owners</th>
<th>Architects/ Platform architects</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sets up governance committee structure</td>
<td>• Advises governance setup group on governance model design</td>
<td>• Coordinates the work needed to set up governance</td>
<td>• Identifies where governance is needed to manage the platform</td>
<td>• Identify where governance is needed for their service</td>
<td>• Identify where governance is needed for their process</td>
<td>• Support technical governance set up, including collaborating on defining guiding principles, controls, and how to apply technical governance across delivery activities</td>
</tr>
<tr>
<td>• Coordinates governance decision-making processes</td>
<td>• Chairs executive steering committee</td>
<td>• Checks that ServiceNow governance aligns with IT and compliance needs</td>
<td></td>
<td>• Apply governance in their service</td>
<td>• Apply governance in their process</td>
<td></td>
</tr>
<tr>
<td>• Documents and updates governance policy and process</td>
<td>• Secures funding for governance</td>
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<td></td>
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<tr>
<td>• Collaborates with enterprise process functions</td>
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</tr>
</tbody>
</table>

3. **Meet with the stakeholders/groups you identified, share your vision and project plan with them, and discuss what might be expected of them as part of the implementation.**

   This conversation should also cover how they may be involved in ServiceNow governance after it’s implemented.

   **Practitioner insight: Be prepared to sell ServiceNow governance to your stakeholders**

   When engaging stakeholders, always start with a pitch that explains ServiceNow governance and its benefits. It is especially important to emphasize the benefits of good governance if your organization has any aversion to the concept of governance or if past governance initiatives have failed.

   If you expect resistance, organizational change management (OCM) practices might complement your governance implementation to help you engage your stakeholders and prepare them for any changes resulting from adopting a ServiceNow governance model.

   Don’t be disheartened if your pitch for governance is initially criticized. In one extreme example, our customer at a Fortune 500 pharmaceutical company shared, “When I started, I couldn’t even use the word ‘governance’ at my organization because it’s too deeply associated with red tape.” Ultimately, this customer was able to foster support for adopting ServiceNow governance by working with their stakeholders and consistently explaining the benefits.
Step 2a: Set up an executive steering board to lead strategy governance

Strategy governance, led by an executive steering board, defines how strategy roadmap decisions are made to align ServiceNow functionality to business outcomes. Start by defining who must be involved in strategic roadmap 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 strategic decisions to use ServiceNow to support desired business outcomes at your organization?
- 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 answered “yes” to all questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Recruit your executive sponsor to chair the executive steering board.**
   Establish an executive steering board, led by the executive sponsor, to oversee strategy governance.

2. **Set a charter for your executive steering board.**
   We recommend that this board aspire to:
   - Drive success of the ServiceNow program by aligning and prioritizing investments with business goals and available delivery capabilities
   - Monitor and direct programs to protect benefits and mitigate program risks
   - Be accountable for the ServiceNow program, projects, and roadmap

3. **Work with your executive sponsor to recruit other stakeholders to the board.**
   One of the most important steps in establishing strategy governance is to define who needs to be directly involved in decision-making processes that determine how your organization will use and govern ServiceNow. 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 executive steering board decision-making:
   - Executive sponsor
   - CIO/CTO
   - Key suppliers and partners
   - Business unit/department representatives
   - Vendor managers
4. **Define what decisions and responsibilities need to be managed by the executive steering board.**

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

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

- Does the current ServiceNow roadmap align with your business objectives?
- How will we revisit and update the ServiceNow vision and roadmap over time?
- Do we have the right partners and partner management in place?

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.

### Executive Steering Board

<table>
<thead>
<tr>
<th>Charter</th>
<th>Members</th>
<th>Responsibilities &amp; Decisions</th>
<th>Outcomes</th>
<th>Typical Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Drive success of the ServiceNow program by aligning and prioritizing investments with business goals and available delivery capabilities.</td>
<td>- ServiceNow executive sponsor (lead)</td>
<td>- Driving success of the ServiceNow program by aligning and prioritizing demand with business goals and available delivery capabilities</td>
<td>- Aligned roadmap</td>
<td>- Strategy &amp; demand review</td>
</tr>
<tr>
<td>- Monitor and direct programs to protect benefits, and mitigate program risks.</td>
<td>- Platform owner</td>
<td>- Resolve escalations and conflicts of interests</td>
<td>- Aligned release schedule</td>
<td>- Alignment and prioritization of platform strategy &amp; projects</td>
</tr>
<tr>
<td>- Accountable for the ServiceNow program, projects, and roadmap.</td>
<td>- Business unit executives (live processes &amp; current projects)</td>
<td>- Ensure project dependencies are identified and shared among the projects</td>
<td>- Release schedule approvals</td>
<td>- Project(s) status</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Platform architect</td>
<td>- Release prioritization</td>
<td>- Project(s) planning alignment</td>
</tr>
<tr>
<td></td>
<td>Optional / guests:</td>
<td></td>
<td>- Approve enhancements</td>
<td>- Capacity review</td>
</tr>
<tr>
<td></td>
<td>- Quality manager</td>
<td></td>
<td>- Approve “platform architecture board recommendations”</td>
<td>- Release schedule approval</td>
</tr>
<tr>
<td></td>
<td>- Compliance &amp; audit</td>
<td></td>
<td>- Aligned project dependencies</td>
<td>- Enhancements review &amp; approval</td>
</tr>
<tr>
<td></td>
<td>- Enterprise architect</td>
<td></td>
<td>- Platform upgrade alignment</td>
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</tr>
</tbody>
</table>

### Typical Agenda

- Strategy & demand review
- Alignment and prioritization of platform strategy & projects
- Project(s) status
- Project(s) planning alignment
- Capacity review
- Release schedule approval
- Enhancements review & approval

5. **Set a cadence for executive steering board meetings.**

We recommend that the executive steering board meet once every 3-6 months, at least.

**Practitioner insight:** Be mindful not to rely only on a cadence of governance board meetings to provide effective governance.

Cadence doesn’t structure what decisions are made or how they are made. Focus on defining how to support the decision-making process that those boards should follow.
6. **Define specifically how the executive steering 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 executive steering board’s decision-making.**

It isn’t enough to simply 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 executive steering board, this information can include the:
  - Most up-to-date ServiceNow vision, business case, program plan, and roadmap
  - Most up-to-date ServiceNow performance dashboard reports
  - Notes from past board meetings, including those from other boards (i.e., the demand 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.
Step 2b: 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 answered “yes” to all questions above, proceed to the next step. If not, complete these action steps to complete this step:

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

<table>
<thead>
<tr>
<th>Charter</th>
<th>Members</th>
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</tr>
</thead>
</table>
| • 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 ServiceNow HealthScan and Instance Security Center – 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.

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Step 2c: 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 answered “yes” to all questions above, proceed to the next step. If not, complete these action steps to complete this step:

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 your 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**

<table>
<thead>
<tr>
<th>Charter</th>
<th>Members</th>
<th>Responsibilities &amp; Decisions</th>
<th>Outcomes</th>
<th>Typical Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assess platform demand against strategic roadmap and guiding principles to ensure demand has best fit usage on the platform.</td>
<td>• Platform owner&lt;br&gt;• Project manager(s) (current Projects)&lt;br&gt;• Process manager(s)&lt;br&gt;• Platform architect&lt;br&gt;• Platform demand manager (may be combined with another platform role)</td>
<td>• Assess platform demand against strategic roadmap and guiding principles to ensure demand has best fit usage on the platform.&lt;br&gt;• Assess effort estimation and design options in order to approve viable demands that provide value to the customer</td>
<td>• Provide decisions on all demand and associated components&lt;br&gt;• Strategy fit – falls within the functional areas of ServiceNow&lt;br&gt;• Service fit – requires only out of the box functionality to meet business needs&lt;br&gt;• Customization assessment required by design review board&lt;br&gt;• Business case – existing case for change and value proposition meets business needs&lt;br&gt;• Effort estimation&lt;br&gt;• Address conditional actions to be completed&lt;br&gt;• Assist in story creation post design decision has been reached</td>
<td>• Review demand items that have been flagged for the review&lt;br&gt;• Run through presented demand design options&lt;br&gt;• Agree on design decisions&lt;br&gt;• Pending&lt;br&gt;• Rejected&lt;br&gt;• Approved&lt;br&gt;• Approved with conditional actions&lt;br&gt;• Address conditional actions and follow-up items</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Good fit</th>
<th>Bad fit</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Extensive use of forms to interact with data (service catalog, mobile)</td>
<td>• One-time tasks</td>
</tr>
<tr>
<td>• Automation of a manual and repeatable business process</td>
<td>• Data is unstructured or analog</td>
</tr>
<tr>
<td>• New tables and table inheritance</td>
<td>• Requires access to proprietary libraries that do not have an API</td>
</tr>
<tr>
<td>• Workflow</td>
<td>• Applications requiring graphics engines</td>
</tr>
<tr>
<td>• Data lookup</td>
<td>• Applications with no process flow</td>
</tr>
<tr>
<td>• Single portal</td>
<td>• Document storage or enterprise content management</td>
</tr>
<tr>
<td>• Machine learning</td>
<td>• Complex calculations</td>
</tr>
<tr>
<td>• REST APIs</td>
<td>• High-compute resources (like blockchain applications)</td>
</tr>
<tr>
<td>• Data can be modeled in a relation database</td>
<td></td>
</tr>
<tr>
<td>• Requires reporting and analytics capabilities</td>
<td></td>
</tr>
<tr>
<td>• Extensible and/or reusable</td>
<td></td>
</tr>
</tbody>
</table>

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.
Step 2d: Define how information flows to and across governance boards to inform decision-making

Governance at the technical, portfolio, and strategy levels are interrelated and should inform each other. For example, roadmap decisions at a strategic level should inform when and why upgrades are planned at a portfolio level, which should in turn inform priorities for upgrade management at a technical level. These decisions should be made by separate groups to avoid overlapping responsibilities and ensure the right specialists are involved in the right decisions, but they need to remain in sync with each other to avoid siloed decision-making.

Check your progress:

- Have you documented how governance boards will interact with each other to avoid silos?
- Do you know what information needs to be shared across boards to inform decision-making?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Coordinate collaboration across governance boards.**

   Define how your governance boards will interact with each other. Clearly articulate when they need to work together and how the decisions of one board will impact the actions of another.

   We recommend mapping this visually. Start with the map below and modify if needed. Note that you can also include other groups (like the “operations CAB” team below) in your map to show how your governance boards work within the larger organization.
2. **Coordinate how governance boards will share information.**

   Effective sharing and collaboration across governance boards reduces the risk of uncoordinated or contradictory decisions.

   Define how your boards will share information and how they'll collaborate across boards after you establish the governance roles and authorities. Standardize how they'll inform decisions and record them into policy across governance bodies, including any governance bodies that may be indirectly related to ServiceNow in your organization.

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**Return to workbook checklist**
Step 2e: 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 answered “yes” to the question above, proceed to the next step. If not, complete these action steps to complete this step:

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.

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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.

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Return to workbook checklist
Step 3a: Define a set of guiding principles or golden rules

Many organizations start by agreeing on a set of principles or golden rules once they’ve established their governance boards. Golden rules are simple, clear statements that help to make sure governance decisions and activities are coordinated at each level. These principles deliver early value by defining a north star for how decisions should be made and for how you expect the Now Platform to be used at your organization. They’re intentionally less detailed than formal policies and standards.

Check your progress:

- Do you have a set documented high-level principles that the people in your organization can apply to inform decisions in the absence of an exact policy?

If you answered “yes” to the question above, proceed to the next step. If not, complete these action steps to complete this step:

1. Define the initial principles.
   Share these draft principles, or golden rules, with your governance boards (below). Ask them what they would change, add or delete from these principles. When you have a final set of principles that your boards agree on, finalize and circulate them to the teams that work on ServiceNow at your organization.

Over-arching principles

<table>
<thead>
<tr>
<th>Think Experience First</th>
<th>Drive Change, Challenge Status Quo</th>
<th>Quickest Path to Value with Acceptable Risk</th>
<th>Out of the Box First</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architecture</td>
<td>Design</td>
<td>Data</td>
<td>Governance</td>
</tr>
<tr>
<td>• “Secure” simplified user experience</td>
<td>• Seamless &amp; integrated user experience</td>
<td>• Common services data model</td>
<td>• Decisions based on manage- ability, performance, upgrade-ability, security and UX considerations</td>
</tr>
<tr>
<td>• Configure, integrate, then customize</td>
<td>• Design for real-time</td>
<td>• Keep data clean</td>
<td>• Measurable outcomes-based approach</td>
</tr>
<tr>
<td>• Enable citizen developers</td>
<td>• Automation in mind</td>
<td>• Use data as an asset</td>
<td>• Empowered decision-making within scoped application</td>
</tr>
<tr>
<td>• Minimize waste</td>
<td>• No code, low code</td>
<td>• Stage integration data externally</td>
<td>• Speed to value approach</td>
</tr>
<tr>
<td>• N-0 versioning – always current</td>
<td>• Focus on agile maintainability</td>
<td>• System of process is system of record</td>
<td>• Voice of associate/ change enablement mindset</td>
</tr>
<tr>
<td>• Integration: API first</td>
<td>• Re-use existing where possible</td>
<td>• System of record then source of truth</td>
<td></td>
</tr>
</tbody>
</table>
Step 3b: 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 answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

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, fullfillers, 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.

Return to workbook checklist
Step 4a: Set metrics to measure the effectiveness of governance at your organization

Define metrics that measure the effectiveness of your governance process and policies and track them over time to identify where you should consider making improvements.

Unlike system performance metrics, the metrics to track governance don’t need to provide exact measurement nor should you need to track them in the platform. They can be simple, even anecdotal benchmarks that you track over time to track performance and identify opportunities to improve.

Check your progress:

- Have you defined a set of metrics that you can track over time to identify how well governance is working?
- Do these metrics help you identify where improvements are needed?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. **Define a simple set of three to five metrics to diagnose where governance can be improved.**

   Start by considering metrics that help you measure:

   - **How efficient your decision-making processes are, for example:**
     - # of decisions your boards are making each quarter – Track roughly how many individual decisions are being made by each board. Tallying the number of agenda items across a quarter provides a good proxy but ideally you could count how many times your board makes a final decision on something (e.g., calls a vote, reaches consensus, etc., depending on how your boards decided to finalize decisions). As a bonus, any details on what different types of decisions are supported would be interesting to track.
     - Board member participation rates (%) – Meeting attendance is a good informal metric that can indicate the burden of governance on your board participants. Declining participation could be an indicator that governance is overly burdensome and/or that members don’t think the meetings are adding enough value to be worth the time to participate.
     - # of board meeting count per quarter – Track how often your boards meet in an average month. Compare this count to the cadence agreed on in your board charter—is it more or less? Also note trends in this count. An increasing cadence indicates an increased burden on your boards and, potentially, that governance isn’t generating efficient enough decision-making for your organization. Agendas that spill over and require additional follow-up meetings are a red flag.
     - Average board meeting duration (hours) – Increasing meeting times may indicate that governance efficiency isn’t keeping up with demand. If you see this, try to root cause what is preventing efficient decision making—is more preparation required before meetings? Are there too many participants in a given board? It’s important to limit the amount of time spent in board meetings to limit the burden placed on board members, so efficiency is key.
• How effective, comprehensive, and current your governance policies are, for example:
  o % reduction of escalations to governance boards over previous quarter – Tracking this can help you measure if the governance you’ve established is informing front-line work and decisions throughout your organization. If escalations don’t decrease, it’s possible that people in your organization aren’t aware of the policies, that they aren’t following them, or that the policies don’t provide the guidance they need. You can measure this by monitoring the agenda items addressed by your governance boards and identifying the needs that result from escalation.
  o # of defined ServiceNow governance policies – Simply tracking the number of policies you define provides a quick measure of how much control (i.e., red tape) you’ve built into your established governance. Rule of thumb: Single-digit measures are likely too low, and triple-digit measures are almost definitely too high. Ten to 25 policies can be a sweet spot, depending on how much control you need in your organization and/or industry.
  o % of policies that have been updated in 24 months – This indicator can help you track how frequently you’re revisiting and improving governance over time. Policies don’t have to change, but it’s very likely that a significant percentage of your defined policies will need to be updated within any given 24-month period.

Return to workbook checklist
Step 4b: Continuously assess and improve governance performance

Best-in-class ServiceNow governance is dynamic: it evolves to reflect what you need to drive your business objectives. As with any minimum viable product, most organizations will likely discover over time that they need to iterate, optimize, and refine their minimum viable set of governance policies.

Determine how you’ll revisit and improve governance over time to ensure that you can continue delivering value while mitigating risks.

Check your progress:

- Do you know how you will identify where governance is inefficient or failing and then improve?
- Have you thought about how to reduce the need to escalate decisions to governance boards?

If you answered “yes” to both questions above, check the box. You’ve successfully implemented ServiceNow governance! Remember to consistently reevaluate and continuously improve governance at your organization.

If not, complete these action steps to complete this step:

1. **Conduct periodic governance audits.**

   We’ve found that the best way to make sure you maintain the right amount of governance is to get your governance groups to periodically review where they can simplify their decision-making processes and policies. This goes beyond searching for where you can remove bottlenecks in approval processes. It involves auditing the portfolio of existing governance policies and processes and looking specifically for opportunities for simplification.

   You can think about this as a governance audit with the goal of identifying where a process or policy adds value and should be preserved and refined, and where it’s simply red tape and should be changed or removed.

   We recommend setting a cadence for how often you conduct these audits. You should conduct one at least every time you start work on an upgrade, because upgrades can change how work is done on ServiceNow.

   It can help to consider where specific governance processes or policies fall on a two-by-two chart (like the one on the next page) that plots the value a policy delivers against the burden that policy places on the organization in terms of administration and adherence.
2. Use what you learn from your governance metrics and audits to identify where to improve and streamline ServiceNow governance at your organization.

Your first priority should be to act on lessons learned from your governance audit. Present your relevant findings to each board and ask board members to approve any suggested policy and process modifications and removals. Then follow through according to their guidance.

Next, consider how else you can improve how quickly and efficiently governance works by:

- **Removing bottlenecks in governance decision-making** – Identify barriers that slow down your governance boards’ ability to make decisions quickly. For example, do they always have the right information at hand to inform decisions? Is low board member participation preventing your boards from reaching final decisions? Resolve for these bottlenecks accordingly.

- **Empower local decision-making to avoid constant escalation to boards** – Review governance board agendas and identify recurring or boilerplate decisions that governance authorities should not have to continue spending time on. Then define and communicate policies to managers and individual contributors so they know how to adhere to standards and make decisions accordingly, without having to escalate the same questions to governance boards in the future.

- **Enable governance to flex to meet the changing needs of the organization** – Make a plan for collecting feedback from people in your organization about where governance is making their work harder and streamline governance to address concerns where possible.

**Practitioner insight: Focus on maintaining the right amount of governance over time.** Governance can quickly become a quagmire over time: Policies that aren’t revisited and reevaluated can add up like technical debt, with similar consequences for cost and speed. To avoid this, you need to continuously work to maintain the right amount of governance—your set of defined policies should add more value, by clarifying decision-making and accountability, than they “cost” in terms of the time and effort required for organizational administration and adherence.

While you can (and should) periodically assess where policies can be removed or modified to maintain the right amount of governance, you should consider this every time new policies are defined. To do this, ask yourself the following two questions every time new governance policies are defined:

1. Does the value of this policy (such as the risk it mitigates or the speed it enables) outweigh its cost (such as the time and burden required for administration and adherence)?

2. After adding this policy, does our full set of policies deliver value that outweighs the cost of administrating and adhering to them?

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