SUCCESS WORKBOOK

Develop your ServiceNow partner strategy

Developed by the ServiceNow Best Practice Center of Excellence

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servicenow

What is a ServiceNow partner?

A ServiceNow partner is the vendor you work with to implement and capture value from ServiceNow®. Partner organizations often have access to a large knowledge base from previous engagements and provide critical skills that are required for successful technical deployments.

ServiceNow recommends working with partners with product line expertise in the solution you're deploying. A partner with product line expertise is a vendor that's registered in the ServiceNow Partner Program and meets a strict set of criteria that ServiceNow regularly reassesses. ServiceNow verifies which partners have the experience and expertise needed to deliver successful ServiceNow implementations based on criteria such as:

- Product implementation expertise (e.g., Performance Analytics, HR Service Delivery, Customer Service Management, ITSM, etc.)
- Number of certified professionals (by product) and authorized trainers
- Customer satisfaction rating
- Customer success stories
- Country and regional coverage
- Ability to provide appropriate levels of consultative guidance and domain expertise aligned with the various product lines they support

Having a partner with product line expertise will help your implementation go smoothly and deliver value quickly.

What does a partner strategy include?

If you have a partner strategy, it means you have:

1. An objective process in place to identify, select, and evaluate potential partners
2. Clearly defined roles and responsibilities (i.e., a RACI) between the partner(s) and the ServiceNow internal team
3. A well-defined onboarding plan to set up partners for success
4. Defined measures to manage partner performance

Why is it important to build your partner strategy?

A well-defined approach to select and manage your ServiceNow partners will:

- Align your organization's needs with your partner's capabilities
- Deliver a successful implementation of ServiceNow to achieve your organization's vision and desired business outcomes

What are the prerequisites to building a ServiceNow partner strategy?

Before you start building your partner strategy, you must:

1. Understand the business outcomes your organization expects to achieve with ServiceNow
2. Know which Now Platform® capabilities you own and plan to implement
3. Know the skills and capabilities of the people who may be involved in implementing or using ServiceNow

What will this workbook help me do?

This Success Workbook explains the steps to building an effective partner strategy for ServiceNow. You'll find guidance on how to:

- Establish a partner management approach that aligns with your organizational needs
- Effectively search for, evaluate, and select a partner
- Define your partner's role and relationships
- Manage your partner's performance

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: Develop your partner strategy

Step 1: Establish your partner evaluation and selection approach

- [ ] Build a partner evaluation and selection team
- [ ] Define your partner requirements
- [ ] Create a partner evaluation scorecard

Step 2: Search, evaluate, and select a certified partner

- [ ] Search for potential partners
- [ ] Evaluate and select a partner

Step 3: Set your partner up for success

- [ ] Set your partner up for success with effective onboarding

Step 4: Manage ongoing partner performance

- [ ] Create processes to manage partner performance

Step 1a: Build a partner evaluation and selection team

You need a multidisciplinary partner selection team to support partner exploration, evaluation, and selection. This team must have the expertise to support decision-making across the partner selection journey, address needs and concerns of ServiceNow stakeholders across the organization, and effectively onboard the partner.

Check your progress:

- ❑ Do you have a multidisciplinary partner selection team?
- ❑ Are the responsibilities for each team member in the partner selection team clear?

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 the participants you need in the partner evaluation and selection team.**

   Your goal is to create a cross-functional, multidisciplinary evaluation team that comes together to lead the evaluation and selection of potential partners. Include these stakeholders:

   - A Now Platform owner
   - A ServiceNow executive sponsor
   - Member(s) of procurement or vendor management
   - Member(s) of finance (as a prerequisite, make sure you work with finance to have an approved, set budget for partner services)
   - Member(s) of security
   - Member(s) of legal
   - Program management
   - Representatives of important ServiceNow users, potentially process/service owners (as applicable)

2. **Establish your partner evaluation and selection approach.**

   Once you've identified whom you'll include on the partner evaluation team, establish a common understanding of what the team needs to achieve and the process to achieve it. This includes defining the approach you'll follow to find the right partner for your ServiceNow implementation.

   Here's an example of an effective partner selection approach:

   a. Identify your requirements—those that you must have and those that are nice to have.

   b. Define the objective evaluation criteria to short list three to five potential partners.

   c. Send RFP/RFI to short listed partners. The RFP includes a form that partners complete to provide additional information.

   d. Review the partner presentations and interview them to dig deeper on their RFP/RFI responses.

   e. Compare partners and select one.

3. Define the responsibilities of each team member.

Clarify the responsibilities each team member should have in order to make your project successful. Consider building and agreeing on a RACI for each member of the team to outline who is responsible, accountable, consulted, and informed across key functions. Start with this example template and modify it as needed:

	Platform owner	Executive sponsor	Procurement	Legal	Security	ServiceNow user representative	Program manage ment
Define requirements	R	A	I	C	C	C	C
Search partners	..						
Evaluate partners							
Select a Partner							
R: Responsible, **A**: Accountable, **C**: Consulted, **I**: Informed							

Ask for a project manager

Most members of your partner evaluation team will likely be wearing multiple hats and be super busy with their day-to-day activities. Using a project manager to manage your partner selection process can help keep the partner selection project on target, meet your ServiceNow implementation deadlines, and allow you more time for strategic focus and better decision-making.

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Step 1b: Define your partner requirements

Your next step is to define what you need from the ServiceNow partner. Preparing these requirements early will help you be more effective across the partner evaluation and selection process.

Check your progress:

- ❑ Do you have a clear understanding of your requirements for working with a ServiceNow partner?
- ❑ Have you documented your requirements?

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

1. **Understand the ServiceNow partner ecosystem.**

   Start by reviewing different types of partners in the ServiceNow ecosystem.

Type of ServiceNow partner	Description
Provides implementation services	These partners implement ServiceNow solutions and provide professional services to ServiceNow customers. The ServiceNow instance is managed by the customer.
Resells products and solutions	These partners market and resell ServiceNow products and services. These could include industry solutions developed to target specific uses cases on the Now Platform.
Outsources or manages services	These partners manage and operate the ServiceNow instance for you. They also offer their own direct service(s) based on their own ServiceNow instance.
Technology (develops apps and integrations)	These partners build, test, certify, and distribute apps and integrations built on top of the Now Platform.

ServiceNow also segments the partners in its ecosystem based on their offering development maturity and go-to-market maturity—these include Registered, Specialist, Premier, Elite, and Global Elite.

Make sure all members of your partner evaluation team understand the different ServiceNow partner types and segments. This will inform how you think about your requirements.

2. **Define your partner requirements.**

The next step is to define what you're looking for from your ServiceNow partner. Follow these steps.

Step 1: Define what type of ServiceNow partner you want to work with

Your first step in defining your requirements is to work with your ServiceNow account team and agree on what type of partner you should work with. Use these considerations:

Type of ServiceNow partner	When ServiceNow customers typically engage them
Provides implementation services	When you're looking to implement a particular ServiceNow product or capability
Resells products and solutions	When you want to purchase ServiceNow products and solutions created on the Now Platform through the partner
Outsources or manages services	When you're looking for the partner to manage the ServiceNow instance as a service
Technology (develops apps and integrations)	When you're interested in creating special apps or integrations for the environment

Step 2: Define the skills and experiences you would need your partner to bring

- **Product line implementation expertise –** What specific skills and experiences would you require the partner to have, based on the ServiceNow products and capabilities you want to implement?
- **Team's product skills and certifications –** What specific level of ServiceNow certifications is best suited for your needs?
- **Industry expertise –** Is it critical to work with someone who has experience in your industry? Think about the use cases you want to deliver through ServiceNow. If they're unique to your industry, then they're critical needs.
- **Domain expertise –** What's their experience and expertise with the domain of the products required for implementation? For example, if you want to implement ServiceNow DevOps capabilities, what experience does the partner bring in working with DevOps technologies and use cases?
- **Implementation methodology experience/expertise –** Would you require them to follow agile or waterfall practices? Would you need them to take over project management for the implementation? Are there any delivery time requirements (such as a go-live within six months)?
- **Digital transformation experience –** Would you need them to map out and simplify existing processes to prepare for a successful implementation?
- **Organizational size experience –** Do you require the partner to have experience working with organizations of your size?

Step 3: Define what maintenance and adoption support you need

- **OCM and training –** Would you need them to guide you on the organizational change management required for driving Now Platform adoption? Would you need the partner to provide any product training to administrators and users?
- **Platform maintenance and governance –** Would you need the partner to guide you on platform governance so you can avoid additional technical debt while scaling the platform?

Step 4: Define your vendor maturity or health requirements

- **CSAT –** What is the minimum acceptable CSAT rating?
- **ServiceNow recognition –** Do you have any requirements to work with a particular category of partner (e.g., one with Elite status)?
- **Customer references –** Do you require your partner(s) to bring references of similar implementations that they've done in past?
- **Geographies of operation –** Do you need your partner to be able to support ServiceNow implementation across geographies?

You may have additional requirements from your procurement team, such as the need for having a single contract to manage partners working across geographies. It's is best to identify them and capture them in advance.

3. **Document your requirements.**

   Next, you need to document your requirements. Identify which requirements you must have versus those that would be nice to have. This makes it easier to compare partners objectively. Here are a few examples:

Evaluation category	Example requirements
Product expertise	Must have – Completed three deployments in ITSM, ITBM, and ITOM within the last year with an average CSAT over 4.0 Nice to have – Experience in GRC and HRSD as well
Product line certifications	Must have – Resources certified in the product lines planned for implementation Nice to have – CMA certified resources included
Industry experience	Nice to have – Experience working with the finance industry
Geographies supported	Must have – The ability to support implementation across AMS and EME
Client experience	Must have – A rating for 4.5 and above out of 5
ServiceNow recognitions	Must have – ServiceNow Global Elite partner status

Consider the support that's available to you directly from ServiceNow services

You may want to consider Now Learning, Customer Success, and/or Expert Services. Decide how you want to these options and add anything additional your partner requires. Always work with your ServiceNow account team to better understand your options.

Document your expectations from the start

At the beginning of your partner journey, document—with great clarity—what your organization expects from a partner. Some organizations expect a partner to implement their clearly defined business outcomes and roadmap, while other organizations are looking for strategic thought leadership and industry or domain expertise. These opposing views of the engagement relationship warrant the partner to staff the roles with different resources. Typically, thought leadership and domain experts command a higher premium in the marketplace than a partner who is implementing your organization's roadmap does.

Be certain to clearly account for these expectations in your requirements so you can evaluate potential partners accordingly and set them up for success with your organization.

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Step 1c: Create a partner evaluation scorecard

Your first step in creating your partner strategy is to build a partner evaluation scorecard based on your requirements. This scorecard will be instrumental as you identify and evaluate potential partners.

Check your progress:

- ❑ Do you have a clear understanding of your requirements for the ServiceNow partner?
- ❑ Have you documented your requirements?
- ❑ Do you have an objective, weighted scorecard to consistently evaluate partners?

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

1. **Build a partner evaluation scorecard.**

   Create an objective scorecard that all evaluation team members can use to score a partner and discuss the partner's match with your requirements. If your requirements are clearly documented and quantified (see Step 1b), all you need to do to create the scorecard is:

   a. **Discuss and decide on the weightage points associated with reach requirement –** Some of your requirements are going to be more important than others, so you must have weights associated with each requirement. Consider using a simple three-point weightage scale (1 = nice to have, 2 = important to have, 3 = critical need).

   b. **Define a scoring mechanism –** Consider a simple three-point or five-point scoring scale such as: 1 = doesn't meet the requirement, 2 = meets the requirement, and 3 = exceeds the requirement. Allow the evaluator to add notes to explain their scores.

This partner evaluation scorecard will be used across the partner evaluation steps, starting with creating a short list of partners you'll send RFP/RFI requests to, then evaluating the responses, until finally selecting the partner. Note that cost is critical criteria to evaluate partners on, but it can stay out of the scorecard since you don't need to score the partner on it.

Here's an example partner evaluation scorecard format to consider:

Category	Example requirements	Weightage points (1–3)	Partner A <name>		Partner B <name>	
			Details	Score	Details	Score
Product line expertise	Must have – ITSM, ITAM, ITBM, ITOM Nice to have – GRC, HRSD	3				
Team's product skills and certifications:	Must have – Resources certified in the product lines planned for implementation	3				
Industry expertise	Nice to have – Industry experience	2				
Implementation methodology experience	Must have – Evidence of experience in agile and has the Now Create badge	1				
Digital transformation experience						
Domain experience						
OCM and training						
Maintenance						
Customer Satisfaction Rating						
Geographies of operation	**Consider the language requirements you may have					
Scoring: 1 = doesn't completely meet requirement, 2 = meets requirement, 3 = exceeds requirement						

Additional criteria to include could be "cultural fit," "financial stability," and "thought leadership." Use the template above and customize it as needed.

Consider assigning an evaluation category to each evaluation team member, so they can focus their questions in that category during the evaluation.

Use the partner evaluation scorecard as a qualification and discussion tool

You may find a partner who scored relatively lower on the scorecard yet turns out to be a great fit for your organization. Give the scorecard to the evaluation team so they can have a constructive, unbiased discussion on the partner's strengths and weaknesses.

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Step 2a: Search for potential partners

Now it's time to search for potential partners to evaluate. The ServiceNow ecosystem of partners is abundant, ranging from smaller boutique firms and specialized partners to large, global system integrators. Performing a comprehensive and targeted search for potential partners is an essential start to supporting a thorough evaluation and selection process.

Check your progress:

- ❑ Have you searched multiple sources to identify potential partners?
- ❑ Do you have an objective way to prioritize your list of potential partners?

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

1. **Assemble a list of potential partners.**

   Your first step is to assemble a list of potential partners that you'll evaluate. Consider using multiple sources, starting with these:

   - Review the partners listed on the ServiceNow Partner Finder.
   - Review the presentations partners made in ServiceNow events such as Knowledge, SNUGs, and Now at Work.
   - Research partners on sites like D&B Hoovers and community groups like the ServiceNow Community. These sites give you a way to get previous customer references.
   - Ask your ServiceNow account team for guidance. Account team members can't select a partner for you, but they can give you guidance on how to evaluate them to find the best fit.
   - Ask your evaluation team for suggestions based on their experience. Have they learned anything about the partners through their personal networks?

Notes on using the Partner Finder

If you're looking for a registered partner, you won't find them on the Partner Finder. Instead, go to the comprehensive list of ServiceNow partners and refine the list by **Segment** > **Registered**.

2. **Prioritize your list of potential partners.**

Evaluating too many partners is time consuming and draining for the team. As you identify potential partners, fill out the partner evaluation scorecard (see Step 1c) to prioritize a short list of partners (at least three, but no more than five, unless you have a good reason to have more) to proceed with the next step.

You may need to create separate prioritized lists if you'll need to engage with multiple partners. For example, you might need a separate partner for each geography or a separate partner to implement a particular ServiceNow capability.

Avoid the urge to simply go with the partner that you've worked in past

Many organizations simply turn to a vendor they've worked with in the past. But keep in mind that past performance alone doesn't predict future performance—this is especially true as your business needs and context evolves over time. Always exercise due diligence and seek out new partner candidates who can offer you different perspectives and, potentially, a better experience.

3. **Send an RFP or RFI to your list of prioritized partners.**

   Once you have selected a prioritized list of potential partners, your next step is to send them a request for proposal (RFP) or a request for information (RFI), whichever your organization's procurement team prefers.

   The key elements to include in the RFP/RFI are:

   a. **An overview of your organization's transformation vision with ServiceNow –** This section highlights what you want to achieve with ServiceNow. Consider providing details on:

      - **Business outcomes your organization wants to achieve with ServiceNow –** Here are a few examples: create a better, more intuitive user experience for our customers or employees, lower the time to resolution for tickets and cases, or develop a set of new processes. Be descriptive about the outcomes you want to achieve but leave room for the partners to give a creative response. Avoid overly long lists of individual requirements.
      - **Projected implementation timeline –** Include timelines for when you want your partner to start, your projected go-live, and any other details you have on iterations or implementation phases.
      - **Evaluation of your current state –** This includes details on:
        - Legacy systems that you want to replace and/or consolidate
        - The expected number of ServiceNow users across your organization
        - In-house ServiceNow expertise
        - The health of your current processes
        - The volume of work you'll handle using ServiceNow (for example, the number of support tickets per month)
        - The ServiceNow licenses and modules purchased already (if any)

   b. **Your evaluation criteria and process –** This section highlights what you hope to get from your partner. Provide a high-level, clear overview of your partner evaluation criteria, requirements, and the process you'll follow. For example, you may want them to do a demo or participate in a "bake-off" type of challenge where each partner creates and demos a custom scoped experience at the same time for evaluation.

   c. **Information you need from the potential partner to proceed further –** Provide a checklist of items and information you need each partner to provide in response to your RFP/RFI. Consider adding an information-gathering form that partners need to fill out as part of their response. This might include:

      - **Proposal summary –** In this section, the potential partner can describe how they fit with your organization's needs and evaluation criteria, what sets them apart from the rest of the partner ecosystem, and why your organization should work with them.

- **Proposal summary –** In this section, the potential partner can describe how they fit with your organization's needs and evaluation criteria, what sets them apart from the rest of the partner ecosystem, and why your organization should work with them.
- **Partner implementation methodology and engagement approach –** Here, the partner can provide details on their approach to ServiceNow implementation, including how they work with change management and governance processes. They can also give examples of similar implementations they made in the past. When you create your information-gathering form, you may want to include specific questions such as:
  - What's your software development methodology (agile, waterfall)?
  - Do you follow the recommended ServiceNow implementation methodology Now Create?
  - What type of support model do you offer (email, phone, portal, chat)?
- **Staffing –** In this section, the partner gives details on how they'll staff your implementation team. You might ask them to include resumes and an organizational chart that shows their team members and their experience. Example questions to include are:
  - What percentage of your staff are ServiceNow certified?
  - Who will work on our project? Please share the team's background.
  - What ServiceNow products (ITSM, HR, CSM, SAM, etc.) are your organization's staff certified in?
  - What's the average tenure of the team working with ServiceNow products?
  - Where are your staff located (locally, offshore)?
- **Services –** Here, the partner can describe the services they offer to support your ServiceNow implementation.
- **Cost –** Ask the partner to provide a financial proposal with line-item details.
- **References –** Ask partners to submit references (preferably three) from clients that had requirements similar to yours within the last three years.
- **Other details –** Adding a section like this gives partners an opportunity to provide any other details that will help build their case for partnership with your organization.

Don't forget to ask for a response within three to four weeks of receiving the RFP/RFI. You may even want to explain that you'll start evaluating responses on a rolling basis to encourage faster responses from the partners.

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Step 2b: Evaluate and select a partner

The goal of the partner evaluation process is to thoroughly vet proposals from potential partners. This includes interviewing partners and collecting additional information on them to evaluate their people, process, and technology approach (think of instance architecture as an example).

Check your progress:

- ❑ Do you have a master list of interview questions to ask partners?
- ❑ Do you have a partner selected based on the predefined evaluation criteria?

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

1. **Evaluate the RFP/RFI responses your potential partners submitted.**

   Review the submitted RFP/RFI forms with your partner evaluation team and identify two to three partner candidates for final evaluation.

2. **Conduct a final evaluation of the candidates you selected.**

   For a thorough evaluation of partners, you need to dig deeper into the partner's RFP responses. Consider the "bake-off" activity described earlier with each partner completing a common use case and presenting their solution to the evaluation team. Alternatively, you can request demos of their past implementations.

   In any case, consider interviewing the candidates to further assess your evaluation criteria and capture details that can inform your selection decision. Here are examples of questions to ask your final partner candidates. Tailor these based on your preferences and the products you plan to implement.

   - What's your experience with moving organizations to the cloud?
   - What's your experience with implementing ServiceNow mobile-enabled products?
   - Can you provide examples of manual business processes you automated with ServiceNow workflows for your customers?
   - Can you provide examples of when you helped transform an organization's employee and/or customer experience?
   - What's your experience with implementing innovative ServiceNow functionality, like Agent Intelligence, AIOps, machine learning etc.?
   - Can you provide case studies and references of customers you helped achieve digital transformation goals with ServiceNow?

   Make sure your evaluation team judiciously uses the evaluation scorecard (created in Step 1c) to compare partners. You may have to extend your evaluation scorecard to cover additional evaluation topics that come up during or after the RFP/RFI phase.

3. **Negotiate and agree on the SOW with the selected partner.**

   Finally, ask the partners you chose after evaluating them (there can be more than one) to submit a final project proposal, including a statement of work (SOW) and pricing. As part of your review of the SOW, clarify (and negotiate on) the distribution of responsibilities between the partner (or partners, if you have more than one) and your internal team.

   Work with the internal team and the partner to agree on a RACI for the activities required across the five stages of ServiceNow's core implementation methodology (Now Create). Use this table to help define the RACI. You may have additional partners (or maybe ServiceNow) involved in supporting the implementation, so include them in the RACI if this describes you.

Implementation phase	Activities	Partner's role	Internal team's role	Others (e.g., ServiceNow)
Initiate	Understand the business objectives	**R/A**	**R/A**	**C/I**
	Establish program governance	**C/I**	**…**	
	Establish the project team	**R/A**	**…**	
	Formally kick off the project			
Plan	Conduct process, platform, and integration workshops			
	Define, review, and prioritize the product backlog			
	Release planning			
	Finalize the project timeline			
	Document the test strategy			
	Set up the environment			
Execute	Run agile scrum cycles			
	Define support processes and hypercare approach			
	Execute communications and awareness programs			
	Planning for system and UAT			
Deliver	System testing and user acceptance testing			
	Go-live planning			
	Operational readiness			
	Training			
	Go-live			
Close	Operational handover			
	Hypercare support			
	Lessons learned			
	Measure value and champion success			
	Formally close the project			
R: Responsible, A: Accountable, C: Consulted, I: Informed				

Make sure that the SOW you sign with the partner you select includes the activities in the RACI and that there are SLAs associated with them.

Be sure you follow your evaluation criteria—don't select a partner on cost

One of the biggest mistakes you can do in your partner selection process is to ignore the evaluation criteria that you put together and choose a partner based only on price. Avoid the urge to do this. Work with ServiceNow account them if you need additional help.

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Step 3: Set your partner up for success with effective onboarding

Your partner's success depends on how effectively they can align with your internal team needs and ramp up to start delivering. To make this possible for them, you must have a strong internal team that's aligned with the partner's scope of work and a robust onboarding plan that sets the right expectations for them and that helps establish clear project management.

Check your progress:

- ❑ Do you have internal processes and teams prepared to support the partner throughout the implementation?
- ❑ Have you collaborated with your partner to create an onboarding plan that will help them ramp up quickly?

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

1. **Build your internal ServiceNow team to work with the partner.**

   Your organization's ServiceNow Center of Excellence and Innovation (CoEI) or ServiceNow platform team are typically responsible for working with and supporting the partner throughout their engagement. However, many organizations don't have an established ServiceNow platform team or COEI when they start their engagement with a ServiceNow partner. If you don't have a complete ServiceNow platform team, build a working group of subject matter experts who can support the partner in:

   - Clarifying existing processes and data
   - Building relevant workflows
   - Managing stakeholders
   - Organizational change management (OCM) activities

   You must have at least one SME for each implementation target area. This SME will also act as the key point of contact within the organization for that implementation.

   Consider using ServiceNow's Platform Team Estimator tool to get an initial estimate on the required FTE roles and time commitments you'll need.

   As you build this group of SMEs to work with your partner, clarify the time commitment you hope they can meet for this project. This will help you make sure your internal resources aren't stretched and gives your SMEs the chance to find someone else to take care of their other commitments as needed.

2. **Transfer knowledge to the partner's project team.**

   The people assigned to work on your ServiceNow implementation project may not have been involved with the conversations and commitments made during the partner evaluation and selection process. Set them up for success by:

   - **Sharing all knowledge on the ServiceNow contract –** This includes the ServiceNow business case and ServiceNow product licenses purchased.
   - **Sharing details on partner selection and expectations –** Include your evaluation criteria, evaluation process, and any specific details on commitments the partner's leadership made to the evaluation committee.

3. **Collaborate with your partner to create an effective onboarding plan.**

   A quick and effective onboarding can significantly reduce the ramp-up time for your new ServiceNow partner. Most organizations have a standard process for onboarding a new vendor. Augment that with the specific needs this partner may have, such as:

   1. **Facilities –** To set up a dedicated working area for their team
   2. **Access to corporate network –** So they can access company tools
   3. **Provisioning of IT hardware –** If the team needs, for example, a dedicated laptop
   4. **Access to data –** May include giving them some special security clearance
   5. **Access to legacy systems –** So they can help migrate to ServiceNow

   Your partner may also have recommendations on how to initiate the engagement with your internal teams. For example, they might want to have a single introduction meeting with all stakeholders or have separate meetings with each stakeholder group.

   Here is an example of an onboarding plan:

Category	Deliverable	Due date	Status
Access	Facilities access		
	Security access		
	Hardware access		
Data	ServiceNow instance access		
	Legacy system access		
Project kickoff	Team introductions		
	Review ServiceNow licenses		
	Clarify partner RACI based on SOW		
	Review ServiceNow roadmap		
	Define implementation charter/project plan		
	Define performance KPIs (for the project)		
Project tools and methodologies	Setup communication tools (e.g., Zoom, Slack)		
	Set up project management tools (Kanban boards, etc.)		

Use this example onboarding plan as a starting point and review it with your partner and vendor management team to add any additional category or deliverable you need.

Demonstrate your investment in your partner relationship

Demonstrate your investment in your relationship with your strategic partner by:

- Staying involved across the project – This might mean helping and signing off on process design or redesign or signing off on requirements, etc.
- Sharing your corporate strategy so the partner understands your business objectives
- Providing access to C-suite leaders for insight and collaboration on potential innovation opportunities
- Staffing the project appropriately

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Step 4: Create a process to manage partner performance

You'll need an effective process in place to measure and manage your partner's performance. This includes tracking their performance throughout your ServiceNow implementation journey in a way that goes beyond the contractual SLAs—start by creating a communication cadence to motivate your partner's accountability and so you can identify continuous improvement opportunities.

Check your progress:

❑ Do you have someone assigned to manage the partner relationship?

❑ Do you have metrics to track partner performance?

❑ Do you have a regular cadence to communicate and review the partner performance KPIs?

If you answered "no" to the questions above, complete these action steps.

1. **Assign a strong partner manager.**

   To have effective management for the partner relationship, assign a strong (and ideally experienced) manager. Look for capabilities equivalent to:

   - The ability to manage suppliers to meet key performance indicators and agreed targets
   - Strong relationship-building skills that will help them influence the stakeholders' actions
   - Creativity in identifying opportunities and resolving constraints
   - A reputation of being a highly regarded and credible manager

   Your internal team and your partner must be clear on the roles and responsibilities of your partner's manager so you can set the right expectations for relationship management.

2. **Establish a measurement to track partner performance across the ServiceNow implementation journey.**

   Don't wait until the end of the implementation to measure your partner's performance. Have a process in place that holds your partner accountable and indicates potential red flags to avoid any serious consequences.

   ServiceNow advocates that successful implementations have three factors common to them:

   - The **right plan** that's aligned with your vision and executed to take full advantage of the Now Platform to deliver your targeted business outcomes
   - The **right design** that takes full advantage of ServiceNow leading practices and maximizes out-of-the-box capabilities to reduce technical debt and set the foundation for enduring success
   - The **right team** that includes the best experts across all project phases and workstreams to deliver on your vision and plan efficiently and effectively

   We recommend evaluating partners across the three success factors at the end of each ServiceNow implementation phase, then jointly discuss the results. Consider having the partner also score their performance to get their view.

This table shows what it would look like aggregated across your implementation journey:

Implementation phase	Partner had the *right plan*	Partner had the *right design*	Partner brought the *right team*	Overall implementation progress
Initiate	<score>	<score>	<score>	<score>
Plan				
Execute				
Deliver				
Close				
Scoring: 1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; 5 = Exceptional				

This view will help you gauge how the partner's performance is changing or maintaining across the three success factors.

3. Define how you'll communicate your partner's performance and escalation processes.

It's the partner manager's job to reach out to the internal teams and stakeholders to collect the required information to assess the partner's performance at the end of each implementation phase.

The partner manager must share the performance status with the ServiceNow executive sponsor and strategic governance team (if you have one) after each phase. This will also give the partner an opportunity to course-correct so they can deliver the next phase better. Consider having the partner, the ServiceNow account team, your internal implementation team, and your executive sponsor in the discussion to review their performance, capture the lessons learned, address issues, and identify opportunities for improvement.

Maintain transparency and trust with your partner

As you define the performance metrics and associated targets, make sure your partner agrees with them and is committed to them. This will help you build transparency and trust with your partner, making the relationship stronger.

Be a customer of choice

Don't overlook your own role in acting as a customer of choice for your strategic partner. Ask:

- Are we treating our partner as an extension of our organization?
- Are we giving them access to the insights and resources they need to deliver transformational guidance to our organization?

Have we committed enough time and resources to the project and relationship?

Return to workbook checklist

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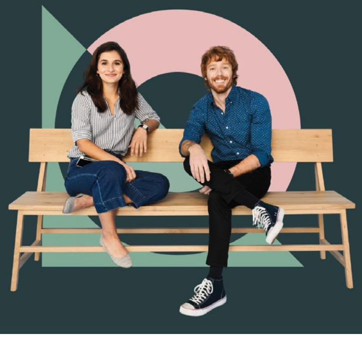
Customer Success Best Practices

ServiceNow's Best Practice Center of Excellence provides prescriptive, actionable advice to help you maximize the value of your ServiceNow investment.



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