

# Top 10 Tips for the NOW Platform

The NOW Platform will help transform unstructured work patterns of the past into intelligent workflows of the future. Yet you need trusted expertise to get the most out of the platform and realize better business outcomes.

**As a ServiceNow Elite Partner,**  
here are our top 10 tips to do just that

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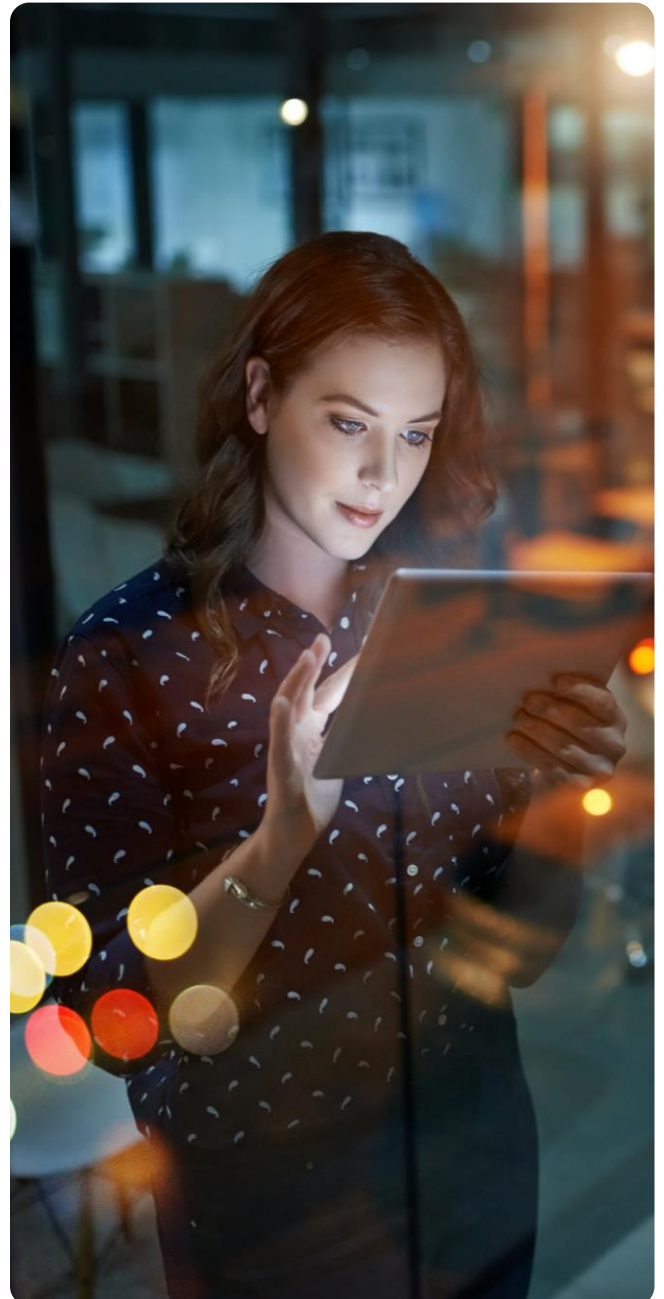
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## 01. Stick to your vision

**Think big** - make sure you first step back and consider your wider business-level outcomes with an IT roadmap and a clear vision of what you want to achieve. Whether you're planning a straightforward IT workflow implementation or looking to improve operational excellence across non-IT service management segments, such as Employee workflows and Customer workflows let the technology facilitate your goals rather than be constrained by it

### Think to Consider

- Service management is more than just improving operational efficiencies, it's a critical foundation of your digital transformation strategy. Without effective control, management and reporting of interconnected services how can any organization implement an effective digital transformation strategy?
- What is your approach to SaaS based platforms? For most organizations, it is still unrealistic to move every platform and service into the cloud, but integration of SaaS and non-SaaS based systems brings with it different challenges to those of on-premise integration projects.
- Risk management, corporate governance, compliance, data sovereignty and regulatory frameworks. These are all critical factors when considering any cloud-based service. You may already have a comprehensive data governance strategy but any potential supplier or partner should be able to contribute to this from a service integration perspective.



## 02. Define your business success

Your business-level outcomes should clearly define how your staff and customers will benefit from your goals and objectives.

### Critical success factors to consider

-  **Internal staff satisfaction scores,** platform adoption rates and delivery improvements
-  **Customer satisfaction scores** and net promoter score (NPS)
-  **Capability and speed to roll out** new services and deliver service improvements
-  **Man-hours saved** per defined time period and improved operational efficiencies
-  **Improved efficiencies & savings** will translate into a net ROI, driving a stronger business case
-  **Freed up internal resources** can be re-tasked to business segments and focused on value creation - a win-win scenario.

As well as avoiding the pitfall of technology for technology's sake, adopting a business-led outcome methodology will enable you to articulate the true value to the business and associated ROI model.

Align the outcomes of each project to the whole program and understand your value streams. Then define the KPIs that define what success looks like for both your project and organization as whole

Ensure you have a clear vision of your organization's strategy to help you define and track the value of the NOW Platform Also consider the ServiceNow product roadmap. Anticipating governance, architectural and feature changes can make a real difference to how you choose to invest in platform.



## 03. Get the message out there

Once your vision, strategy and objectives are defined, they need to be communicated to the right business stakeholders. This is not a one-time event but an ongoing approach that starts with project scoping and gaining informal buy-in, right through to project delivery, training, and ongoing support. These are all basics without which any project will struggle to gain traction.

### Keys to executing your strategy

**Decide which stakeholders to include** at each phase of the project. Roles and responsibilities should be clearly defined for both internal and external stakeholders.

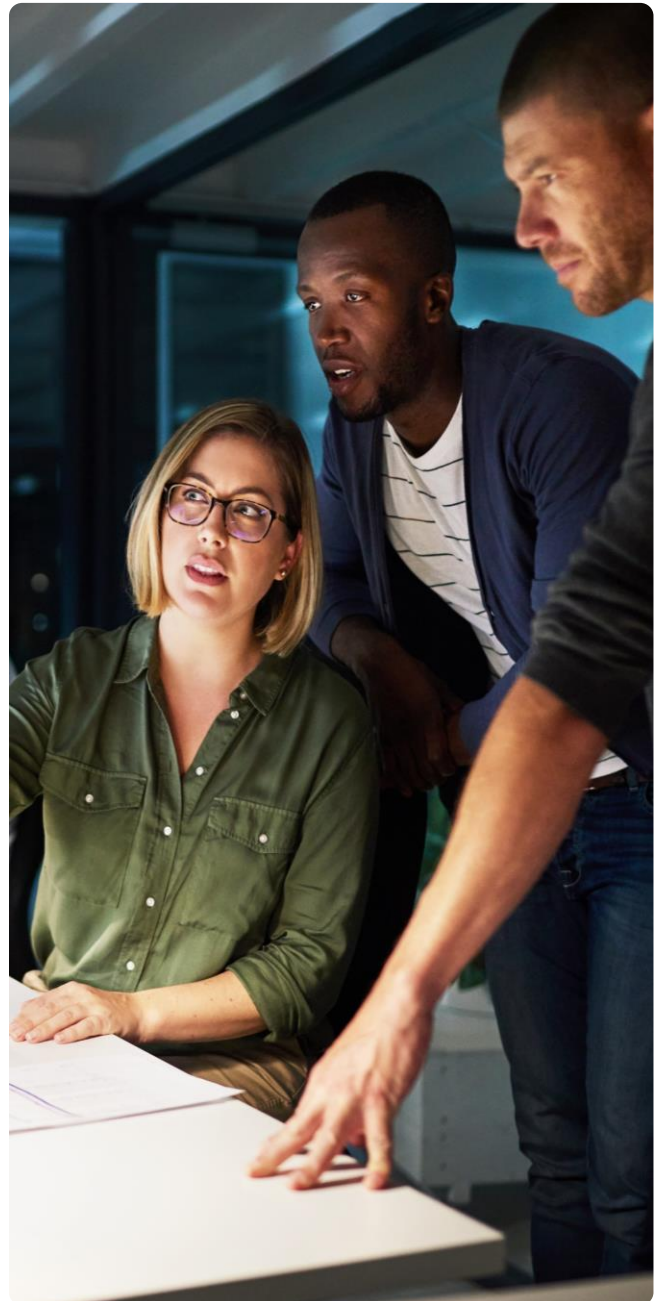
**Employees will need to be educated** both inside and outside the core project group. Decide what your key milestones are. Effective internal marketing and enablement will help drive adoption and faster ROI

**Know your audience** and “keep it short and simple”. Different target audiences will require different levels of engagement. Give people the right depth and breadth of information they need but avoid overloading unnecessarily. Use knowledge bases where appropriate and remember communication is a two-way street.

**Culture is a critical consideration** and will drive the style and level of communication that will most benefit your employees. Additionally, you may need to factor in any translation requirements.

**Share expectations** in terms of the value The NOW Platform will bring to your organization and employees, as well as helping with buyin, this will inform technical choices.

**If you outsource to a ServiceNow partner** then they should contribute with effective collaboration sessions as well as knowledge transfer and ongoing BAU support. All this supports your NOW Platform implementation in terms of identifying, responding, and communicating any new requirements or developments. Additionally, a good change management process can improve the communication about upcoming changes across an organization



## 04. Get your resources right

Involving the right people and resources from scoping through to design, implementation and beyond is key to a successful ServiceNow project. Resourcing will in part be driven by your vision, strategy and goals, but avoid making assumptions of time commitments from stakeholders and project members

Good project management may help with delivery timings, but also consider the level of technical competence, as well as style of project management. Identify the critical competencies you need to deliver your ServiceNow project and when you identify gaps, how to best fill these. Don't limit yourself to the NOW Platform and IT resources but also consider other disciplines such as project management, business architects, end users (including user acceptance testing) and process specialists.

Groups, people and third party suppliers not sufficiently dedicated to your project will cause delays and bottlenecks. Avoid this by getting resourcing right first and choose a ServiceNow partner that matches your requirements. At a tactical level consider the realistic availability of key stakeholders and sponsors during the project and build a resilient governance structure. Define the sponsors role, agree who will remove internal blocks, and who your single point of contacts are

### Working 'with' you and not 'to' you.

Your chosen partner should be helping educate your internal teams throughout the project to instill confidence and enable them to be self-sufficient once live.

### Cultural fit and methodology

The right partner will be an extension of your internal team and should complement and enhance your existing capabilities

### Credentials, capability, and size

Find out whether your potential partner has worked on similar NOW Platform implementations and if they have sufficient resources to commit to your project. ServiceNow certifications are a good base point but beyond this if your ServiceNow footprint grows your partner will need to be able to expand with your ambitions. Whether that likely expansion is across geographies, functional areas, or integrations, be sure to consider your future roadmap resourcing needs



## 05. Don't let the tail wag the dog

**Technology should not decide your business plan. Start by considering what you are trying to achieve and whether existing processes are fit for purpose**

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Consider not only upgrading to the latest NOW Platform release to help you better meet requirements but also the broader implications of the NOW Platform product roadmap. Anticipating the upcoming roadmap enables you to better align your ServiceNow strategy to expected changes in governance, architecture and features, and avoid costly customizations. If you do want customizations then ensure they contribute to business outcomes and are not developed on the basis that because it can be done, it should be done. Keep in mind that an experienced ServiceNow partner will not only follow official ServiceNow methodologies but will bring in external services expertise so you get what you want, not what you have been sold.

## 06. Consider the wider enterprise

**IT Service Management tools have recently matured and ServiceNow is no longer limited to service management across IT.**

Whether you have already deployed ServiceNow or are considering a new deployment, consider the wider enterprise with Enterprise Service Management (ESM). Service Integration, IT Sec Ops, ITOM, HR, and Customer Service are just some of the functional areas that can benefit from the NOW Platform.

Employee workflows can transform how you serve internal clients. HR departments are well placed to deliver strategic value but too often are handicapped by disparate systems and time wasted on administrative tasks.

Customer workflows is an effective way to ensure your organization is treating all your customers consistently well. A less fragmented approach means better customer engagement, less churn and decreased support costs, which increases revenue and brand loyalty for your organization.

In general, a major challenge faced by organizations is how to improve the visibility of data across the wider IT infrastructure. The NOW Platform CMDB enables you to leverage a cloudbased single system of record across your IT and digital services data

The NOW Platform is also being used to make digital transformation more accessible and sustainable. By co-innovating and driving better workflows, the platform can help organizations build an effective strategy to achieve carbon net zero.

Enterprise-wide digital transformation uses proven methodologies, deep domain expertise, and industry-wide experience to help organizations to become more agile by streamlining complex operations.

Additionally, experienced providers innovate with ServiceNow to create horizontal offerings and IP that leverage the partners capabilities to address specific use cases and pain points.

Examples of these include using the NOW Platform in the digital workplace for a more engaged employee experience, driving smarter manufacturing operations with Quality Inspection, and accelerating cloud migrations with a NOW Platform based discovery and service mapping setup.

## 07. Take one step at a time

**A big-bang approach across the enterprise is sometimes a necessity. But a good methodology is to scope out an overall enterprise plan, then focus on one organizational pillar at a time**

This need not necessarily start with IT Service Management (ITSM) but should be based on where you can most quickly and easily add service value to internal and external customers. This in turn can help build a business case for wider adoption across the enterprise.

Human Resources Service Management (HRSM) and Customer Service Management (CSM) are just two of the functional areas with the potential to quickly add value.

A phased approach needn't be limited to enterprise pillars, but equally applies to quick-wins within functional areas themselves, whether that be IT, facilities, legal or HR.

One methodology is to fix legacy and particularly costly operational issues first. Improving operational efficiency with the NOW Platform enables services to become more streamlined, potentially boosting employee productivity and accelerating business delivery.

By taking more of a phased approach, together with careful roadmap planning and prioritization, this can quickly pay dividends and accelerate your ROI. This mitigates risk and potential financial exposure too.

Additionally throughout a phased deployment, use the knowledge management features of the platform to help drive and maintain adoption.

Finally, consider your lifecycle management process and related best practice. A capable ServiceNow partner will bring value to the conversation in all these areas and supplement your internal teams as required

## 08. Become more agile

**ServiceNow lends itself to an agile and iterative development process. By taking a more repeatable and dynamic approach you can create the agility your business needs.**

### Things to consider

Key to your success is having the right people and organizational culture in place to support an agile and iterative approach. If your project management teams are organized around a more structured waterfall methodology then consider complementing internal resources with an agile ServiceNow partner who can help fill these gaps more cost-effectively.

Keep in mind to leverage blueprint libraries and frameworks that have been previously deployed, as well as new and upcoming IP being developed by ServiceNow partners.

Build a governance structure as well as regular audit processes and consider at least an annual review of the NOW Platform functionality, including what is covered by your licenses, and what you are using.

Take advantage of all these productivity levers to be more agile and minimize costs too

**Better mapping of required resources** to specific tasks, objectives and their related ServiceNow processes, thereby improving resource utilization.

**Learn to adapt quicker** to changing project or business requirements gives you far greater flexibility and business agility.

**By identifying and eliminating** risks early in the project, you will achieve higher quality results more reliably and with reduced costs and overheads.

**Regular audit processes** including workflows, data, and reporting to identify and address opportunities and weaknesses including shadow customization



## 09. Prepare for the future

Your project delivery will phase into business as usual, so it's important to consider ongoing requirements

### Planning considerations

#### **Future roadmap and upgrade path for NOW Platform**

Regular ServiceNow releases bring with them enhancements and additional functionality that you may be able to leverage. How you plan and implement these in the future is crucial.

**Continue to see the big picture** after implementing the NOW Platform. Regular audits and reviews will help ensure you maximize the value of new out-of-the-box functionality.

#### **Decide the specific support model you will adopt.**

Consider internal and external resources and the associated requirements. Depending on the size of the deployment and your organization it may be more cost effective to outsource level 2 support, for example

**See ServiceNow as an agent for change** and an opportunity to fix legacy processes and workflows. Stay focused on business outcomes and leverage your partner's expertise to help define priorities and what success looks like.

**Consider the impact on your overheads' and resources' utilization** from your choice of support model.

**If you extend the platform** consider required global resources & architect the solution following best practices.

**Establish a ServiceNow Center of Excellence (CoE)** to concentrate expertise in strategy, architecture, support, design, and development to create a scalable delivery model. An experienced ServiceNow partner can help you setup a CoE and can provide your team with hard to-fill roles such as highly skilled developers & Solution Architects.

## 10. Train your staf

Training is key to driving faster adoption and more successful results for your business. An effective training program will drive faster user adoption and both employee satisfaction and productivity.

### Things to consider

**Fulfiller training may be appropriate** for anyone that manages requests, handles incidents, or resolves issues in your organization. Fulfiller training helps drive user adoption, ensure project success and encourage appropriate software utilization.

**Training should be customized** to your organization and your specific implementation of the NOW Platform. A cost-effective training program is an enabler for users and delivers more value on your overall investment

**Resource utilization** and whether you insource or outsource for specific training requirements is an important factor. Time and investment spent internally may be less effective than using an existing external resource. This is particularly relevant in cases where a training resource is not in constant demand and may result in declining skill retention

**Training styles and programs** must cater to your specific organizational culture and will also vary by country. For example, a more formal training structure is often more appropriate for Asian countries compared with a more informal and self-help structure for Europe and North America

**Leverage tech tips** for industry guidance and relevant best practices, such as this document and others for hands-on consultancy expertise.

**Leverage your implementation partner; they are your go-to experts in ServiceNow.** Having worked on similar projects and environments previously, they have a wealth of knowledge at their fingertips. In addition to this, some partners are recognized as a ServiceNow Training Partner and can offer training to enable your teams to use the platform more effectively.

## Overall: Create a mindset enabling enterprise service management

### Think “Out of the Box”

The NOW Platform, in many cases, is already significantly better than the legacy systems. Leverage self-service portal usage, and start by learning what is there, giving yourself time after you go-live to explore. Many requirements can be easily achieved with existing capability and functionality. Make use of templates, existing features, and modules. This is also true for apps within ServiceNow. Some organizations build custom applications to reflect their needs from scratch, without considering modules which already exist or will exist in the nearest release. While this can be done, it should be an educated decision, as complications can occur when it comes to the upgrade

### Think “Data-driven Design”

Depending on the organization, data changes will be subjected to less stringent change management and testing processes. While you'll save on development, testing and management time, what does it mean for using data instead of coding? An example would be auto closure of an incident after several days of being resolved. Today the business may ask for that time to be 5 days. However, they may start getting complaints from the end users that this isn't long enough and so decide to change their requirement to 7. If 5 days was hardcoded in the development, then the code would need to be updated to 7. Thus requiring this change to be pushed through the environment and tested to ensure it works. All this just to change a parameter, even though the functionality is the same. A better approach is to set this value as a system property, where you can amend it without any risk to the logic being applied or to the business

### Think “Reporting, Reporting, Reporting”

Make sure your data model and processes support your KPIs. Include reporting requirements during the design workshops. What fields are needed? Do you need to configure additional metrics? Where are the process touch-points? If it's not captured in the system, you can't report on it!

### Think Global

Simple to plan and build for but difficult to implement after the fact is localization. If there is any possibility of translating your instance in the future, and even if there isn't, make sure you are using messages in all the business rules and client scripts you build whenever displaying text to the user. In addition, it's not too much work up front to create Translated Texts for items on your portal. Future you will thank you.

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### Think “Design Principles”

Consider your current and future design, ensure that your design principles are scalable and don't forget about performance. With every requirement, assuming due diligence has been done to validate it, ask yourself the following:

- Does the functionality have to happen with the user transaction or can we queue it in the background?
- Can the number of database queries be reduced and consolidated using “is one of” condition?
- Can we limit the results in a database query to return more specific results (functions such as `GlideRecord.setLimit` or `GlideRecord.addQuery`)?
- Is `GlideAggregate` more suitable than `GlideRecord` for the configuration?
- Are there sufficient conditions that only valid business rules are run on any transaction?

