

ServiceNow Custom Training and Adoption Offerings

Table of contents

| | |
|---|----|
| Overview | 2 |
| Custom training and adoption services | 3 |
| Adoption Toolkit deliverables | 5 |
| Adoption Accelerator deliverables..... | 7 |
| Change enablement package deliverables | 9 |
| Change enablement package phases | 10 |
| Custom process user training deliverables..... | 11 |
| Custom training applications by business unit (BU)..... | 14 |
| Custom process user training phases | 17 |
| Pitfalls to avoid when training process users | 20 |
| Custom train the trainer (TTT) FAQs | 21 |
| ServiceNow provided resources | 22 |
| Customer required resources | 23 |

Overview

ServiceNow Custom Training and Adoption (CTA) provides process users with training and go-live supporting materials on how to use the Now Platform® applications as configured in a customer’s production instance, as well as change enablement and adoption services.

The contents of the ServiceNow Adoption Toolkit are for use only by:

- Individuals within a ServiceNow customer organization that has been granted access to the Learning Portal as a result of one of the following:
 - Redemption of learning credits for the Adoption Toolkit.
 - A direct purchase of the Adoption Toolkit.
 - The customer’s purchase of an enterprise or premier customer success package.
- An Authorized ServiceNow Custom Training Partner for one-time use on a customer engagement.
 - The Adoption Toolkit, or any content or templates included therein, are not to be copied, cloned or re-used outside of the one-time customer engagement for which they were purchased.
 - Unauthorized use of these materials will result in termination of Authorized Training Partner (ATP) status.
 - Partners may purchase the training toolkit instead and license content to use for their own customers.

For further assistance, contact customtraining@servicenow.com

Custom training and adoption services

All custom training is provided on ServiceNow-branded templates.

ServiceNow advises that you request resources at least six weeks before the class or engagement start date, to ensure your requested start date for custom training and change enablement packages, as follows:

- **Process user training (PUT):** ServiceNow recommends that you request resources at least six weeks before content development commencement.
- **Change enablement:** ServiceNow recommends that you request resources at the start of your ServiceNow application implementation.

You have up to three business days to confirm ServiceNow training delivery dates, as proposed by ServiceNow.

If you are unable to confirm proposed dates within three business days, ServiceNow will release such dates.

Adoption Toolkit

- The ServiceNow Adoption Toolkit, included with the enterprise and premier success packages or purchased individually, gives you a head start to enable change and educate your stakeholder and process user populations.
- This provides a framework that you can customize to best fit your organizational needs and targets building awareness around how the ServiceNow implementation can improve every-day processes.
- Both the Enterprise and Premier Success Packages include the Adoption Toolkit templates, plus custom training template sets for all business units (BUs).
 - For Professional Success Packages, the Adoption Toolkit is not included. Customers can purchase custom training template sets as needed
 - For any Octane pilot customers, the following applies:
 - For **Premium Plus** customers, they receive the Adoption Toolkit for all five business units.
 - For **Premium** customers, they receive the Adoption Toolkit for two business units (must choose).
 - For **Good** customers they receive the Adoption Toolkit for one business units (must choose).
 - For **Basic** customers, the Adoption Toolkit is not provided.

See the [Custom training applications by business unit \(BU\)](#) section for details.

Adoption Accelerator

- Accelerate your change enablement efforts with these guided workshops for making the most of ServiceNow adoption resources, tools and templates.
- Each workshop lasts two hours, followed by a one-hour coaching session.
- Workshop sessions cover the following topics:
 - Change enablement methodology and planning
 - Champion enablement
 - Communications planning
 - How to customize process user training templates

Change Enablement

- ServiceNow experts step you through the process of change enablement within your organization to increase your time to value and boost adoption.
- Taking a structured approach to managing change removes barriers, identifies and mitigates risks, and paves the way for a successful rollout.
- Change enablement packages are based on the number of applications, number of process users, overall complexity, and are intended for a specific point in time.

Custom Training

- Enabling your users is a key component of adoption.
- Custom Training provides your users with innovative and engaging training classes that educate them on your customized process as implemented on the platform.
 - Sold by application.

See the [Custom training applications by business unit \(BU\)](#) section for details.

Adoption Toolkit deliverables

The following templates and tools are included with the purchase of the Adoption Toolkit.

Note: This does not include change enablement services or the customization of training content development or delivery of training.

| Adoption Toolkit deliverable | Description |
|---|--|
| Overview: How to use the Adoption Toolkit | <ul style="list-style-type: none"> Start here to learn how to get the most value out of your Adoption Toolkit. Includes recommendations for the order in which to use the Adoption Toolkit contents, a description of each component, and directions for use. |
| Master change enablement plan | <ul style="list-style-type: none"> Document activities, milestones, and suggested assets to guide your change enablement efforts. Includes project plan, RACI, stakeholder analysis, business impact analysis, training delivery plan, communications plan, executive sponsorship plan, change champion plan, measurement plan, and common FAQs. |
| Change enablement kickoff deck | <ul style="list-style-type: none"> Used to align project team members to key activities, resources, and timelines of the change enablement work stream. |
| Design workshop presentations | <ul style="list-style-type: none"> Used to lead internal stakeholders through discovery sessions to design and develop your custom change plan for the implementation. |
| Stakeholder analysis instructions | <ul style="list-style-type: none"> Used to understand who your stakeholders are for your ServiceNow implementation. |
| Business impact analysis instructions | <ul style="list-style-type: none"> Used to define process changes that can affect the way people in your organization work. |
| Training needs analysis instructions | <ul style="list-style-type: none"> Used to determine the training needs for your stakeholders and define your training resources. |
| Change plan summary and status | <ul style="list-style-type: none"> Records your change enablement master plan results into a presentable PowerPoint format for sharing. |
| Communications and internal marketing strategy | <ul style="list-style-type: none"> Incorporate best practices to build a robust marketing and communications strategy to support your ServiceNow implementation. |
| Develop a change champion network | <ul style="list-style-type: none"> Cultivate a network of change champions to foster support for your change champion enablement plan. |
| Measurement approach guidance | <ul style="list-style-type: none"> Plan your measurement approach to help drive system usage by means of performance measurements, incentives and mandates to promote return on investment (ROI). |

| Adoption Toolkit deliverable | Description |
|--|---|
| <p>Customizable training content template sets by BU</p> | <ul style="list-style-type: none"> • ServiceNow customizable process user training template set sets provided for classroom-based or recorded learning modules. • These are provided for applications within one BU of the customer's choice. • Each application template set includes the following: <ul style="list-style-type: none"> ○ Slides ○ Practical exercise ○ Quick reference card (QRC) ○ Course outline ○ Scoping checklist • See the Custom training applications by business unit (BU) section for a breakdown of applications offered by BU. • For an additional cost, ServiceNow can provide services to customize these template sets on behalf of the customer. |
| <p>How-to guide for customizable training content templates</p> | <ul style="list-style-type: none"> • Tips for adapting the customizable PUT content (PowerPoint) templates to fit the customer's configured applications. |

Adoption Accelerator deliverables

The Adoption Accelerator is an add-on to the Adoption Toolkit and cannot be sold separately. The following deliverables are included in the Adoption Accelerator package.

Note: The Adoption Accelerator does not include change enablement services or the customization of training content development or delivery of training. These services can be purchased separately.

| Adoption Accelerator deliverable | Description | Best for |
|---|--|--|
| <p>Guided session 1: Change enablement methodology and templates</p> | <p>At the completion of this two-hour virtual session, participants discover:</p> <ul style="list-style-type: none"> • How ServiceNow change enablement methodology and templates can guide your change enablement plan. • Best practices for completing a stakeholder analysis and business impact analysis, which guides development of a champion approach, communications plan and training plan. | <ul style="list-style-type: none"> • Communication leads • Training leads |
| <p>Guided session 2: Champion enablement (Success Center and Now Learning)</p> | <p>At the completion of this two-hour virtual session, participants discover:</p> <ul style="list-style-type: none"> • Best practices for creating a champion network and defining the champion role. • Where to find champion enablement resources in the Success Center and what they are best used for. • How to build a profile in Now Creators. • The purpose and types of content available in Now Learning to build ServiceNow expertise. | <ul style="list-style-type: none"> • Program leads • Functional leads • Champions • Organizational change leads |
| <p>Guided session 3: Communication planning</p> | <p>At the completion of this two-hour virtual session, participants discover:</p> <ul style="list-style-type: none"> • The framework to launch a targeted and timely communications strategy and plan for their implementation. | <ul style="list-style-type: none"> • Communication leads • Program leads • Champions • Organizational change leads |
| <p>Guided session 4: How to customize process user training templates</p> | <p>At the completion of this two-hour virtual session, participants discover:</p> <ul style="list-style-type: none"> • What process user training templates are included in the Adoption Toolkit. • How to easily customize the templates for their specific implementation. | <ul style="list-style-type: none"> • Training leads • Content developers |

| Adoption Accelerator deliverable | Description | Best for |
|----------------------------------|--|---|
| Coaching sessions | Four (one) hour coaching sessions on the four topics of the workshops. Coaching sessions are best delivered one-on-one. | <ul style="list-style-type: none"> Varies by topic |
| Change plan summary | Used to build a directional plan for guiding the change enablement activities for your implementation. | - |
| Communication plan | Used to build a schedule for guiding communication activities that build awareness and buy-in, based on key milestones of your implementation. | - |

Package details

- You are assigned a ServiceNow training and adoption lead.
 - We ask that you assign a single point of contact for the training and adoption lead to coordinate with.
- Virtual workshops are limited to a maximum of eight participants.
 - For best results, we recommend participants remain consistent across sessions.
 - Participant names and roles must be submitted to ServiceNow before the workshop starts.
- Coaching sessions are best delivered one-on-one with one of our training and adoption leads.
 - Customers can adjust how the coaching time is spent, based on the topics of the accelerator package.

Add-on option

- ServiceNow also provides customizable content development and delivery services.

Change enablement package deliverables

As part of a change enablement engagement package, a ServiceNow training and adoption lead carries out the following:

- Customizes the resources of the Adoption Toolkit.
- Guides workshops with your team to learn about your organization and the best methods to engage and educate your impacted users.
 - Their analysis is summarized into actionable outputs to guide the change enablement efforts for your implementation.

Note:

- Change enablement packages do not include custom training templates or customized training content development or delivery.
- These services can be purchased separately.
- See the [Custom training applications by business unit \(BU\)](#) section for details.

The following deliverables are included in the change enablement package:

| Change enablement deliverable | Description |
|---|--|
| All deliverables described in the Adoption Toolkit deliverables section, except the custom process user training templates (sold separately) | A ServiceNow training and adoption lead guides the customer through the execution of all the supporting analyses, planning, and communication described in the Adoption Toolkit. |
| Additional support | <p>Communication development support:</p> <ul style="list-style-type: none"> • Custom communication support provided, based on package purchased. • Can vary from email communication, PowerPoint deck, awareness one-pager, and more. • Custom video development is not included. • All communications are delivered as customized templates for the customer to finalize and execute as desired. <p>Project lessons learned and wrap up:</p> <ul style="list-style-type: none"> • Varies by project. • Adoption lead provides a wrap-up summary that includes recommended customer next steps for long term success. |

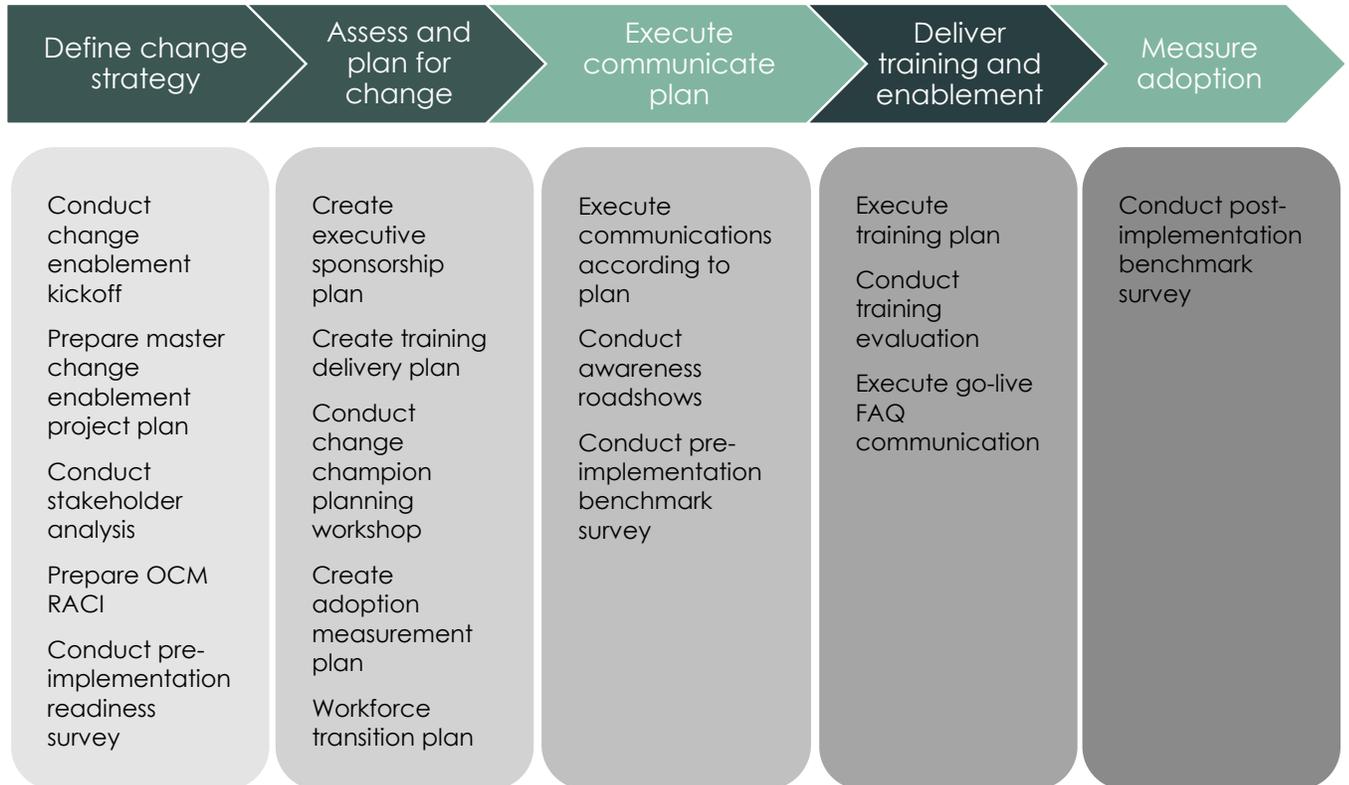
Add-on option

- For an additional cost, customers can purchase customizable training templates geared for process user enablement.
- ServiceNow also provides customizable content development and delivery services.
- These are not included in the change enablement packaged pricing.

Change enablement package phases

With the purchase of a change enablement engagement package, the ServiceNow training and adoption lead plans, organizes, and manages the following project phases with key stakeholders from the company.

See the [ServiceNow provided resources](#) and [Customer required resources](#) sections for more details about phase stakeholders.



Custom process user training deliverables

All custom training deliverables focus on platform process user training based on the customer's configured application(s).

These do not go into details of the customer's specific business processes, policies, roles or responsibilities, but focus on how to use the configured application.

We encourage our customers' process owners to add these details to follow-on training and documentation as needed.

Custom training provides the following deliverables applicable to the applications purchased:

| Custom training deliverable | Description |
|---|--|
| <p>Training content development</p> | <p>Customized platform training, targeted to process users, comprising a PowerPoint presentation with slide notes and a Microsoft Word practical hands-on exercise for each Now Platform application for which training is ordered.</p> <ul style="list-style-type: none"> • The training content includes screenshots of the customer's instance as needed to provide examples. For each application, the customized presentation is based on the customer's configuration of said application at the time the screenshots are captured. • The focus of the training content is how to use the configured application and not the end-to-end process of which the configured application is just a part. • The student exercise is a step by step, hands-on experience for process users to reinforce application learning. This is limited to one learning example per application. Please note this document is not a work instruction and is designed as an integral part of the training package. • All custom training content is provided in English (except where templates have been localized) and on ServiceNow-branded templates. For more information about a current list of localized templates, please contact your local ServiceNow training contact. • Training content and subsequent delivery is focused on the configured application training and not process training. |
| <p>Custom training delivery day: Train-the-trainer</p> | <p>Delivery of custom training to customer-designated trainers who deliver the training to the customer's process user community.</p> <ul style="list-style-type: none"> • Delivery across an eight-hour day, per application. This is a one-day (minimum) session for one group to cover an individual application. • Training is delivered from content developed by the ServiceNow Training and Adoption team in ServiceNow templates and includes slides (at the discretion of the trainer and the customer) and demonstration in the designated customer instance. • Delivery can be conducted virtually or onsite. The customer is responsible for travel costs associated with onsite training delivery. Onsite is highly recommended for TTT delivery • Both virtual and onsite training is limited to ten students. • One delivery day is included in the purchase of one custom training content development process. |

| Custom training deliverable | Description |
|---|--|
| <p>Custom training delivery day: Process user training</p> | <p>Delivery of custom training to customer-designated process users.</p> <ul style="list-style-type: none"> • Delivery of up to three sessions per eight-hour delivery day. The number of sessions delivered in a day are dependent upon the audience and level of complexity of the implemented application and the time zone of the attendees but does not exceed three sessions. • Training is delivered from content developed by the ServiceNow Training and Adoption team in ServiceNow templates and includes slides (at the discretion of the trainer and the customer) and demonstration in the designated customer instance. • Delivery of each application purchased is approximately one to three hours in duration, depending on the complexity of the configured application. • Delivery can be conducted virtually or onsite. The customer is responsible for travel costs associated with onsite training delivery. • Onsite training is limited to 15 students; Virtual training is limited to 25 students. • One delivery day is included in the purchase of one Custom Training content development process. |
| <p>Recorded demo videos (RDV)</p> | <p>Bite-sized (five to eight minutes) professional demonstration videos focusing on one application for process user</p> <ul style="list-style-type: none"> • Fully customized showing your unique instance and configured applications. • Process user applications are approximately 40 minutes of total content for most applications; Please note that Service Portal activities for end users are approximately ten minutes of total content. • Delivered in .mp4 format • Can be attached into a ServiceNow knowledge article or placed on an internal site such as SharePoint or Confluence. • Can be used as both pre and post go-live support • Recorded demonstrations focus on demonstrations only in the customer's configured application. Other documentation is not presented in these types of videos such as PowerPoint slide decks etc. • Videos contain closed captions and are 508 accessibility compliant • Important: Closed captioning is supported with recorded demos provided the customer can host the video in an LMS or internal server. • Conversion of the .mp4 recording to other recorded formats is the customer's responsibility. • Hosting the recordings are the customer's responsibility. • Available at an additional cost. • Max of five (5) videos per application; more can be purchased using additional learning credits. |

| Custom training deliverable | Description |
|---|--|
| <p>Quick reference card (QRC)</p> | <p>Two-page reference document for any ServiceNow application for which training is ordered, including Service Portal for end users.</p> <p>This document highlights important details from the custom training, including workflow steps, key fields, and tips and tricks.</p> <ul style="list-style-type: none"> • Delivered in PowerPoint or mobile format. • Available at an additional cost. |
| <p>Customizable on-demand accelerator</p> | <p>Accelerate your process user adoption with customizable on-demand courses that can be used as templates for customized courses and hosted in the customer's learning platform.</p> <p>Please speak to a ServiceNow team member for application / process availability.</p> <p>Sold per process, per release, and includes:</p> <ul style="list-style-type: none"> • A complete online course with interactivity and rich media. A variety of formats are available including xAPI, MP4, SCORM, and HTML. • (1) Customizable QRC in PowerPoint format. • (2) Setup support hours, as needed. This includes answering questions related to how to best customize the learning templates based on design, and how the files are prepared for your use. |
| <p>Custom on-demand course (ODC) development</p> | <p>Customized by ServiceNow, this interactive online training is based on the customer's configured applications.</p> <p>Comprises custom content, including screencasts and interactive practice simulations delivered in English.</p> <ul style="list-style-type: none"> • Provided in a web-responsive format suitable for all form factors (HTML5). • Hosting on-demand courses is the customer's responsibility. • Available at an additional cost. |
| <p>Custom guided tour (CGT) development</p> | <p>Available in some process user applications and the Service Portal.</p> <p>Please check with a ServiceNow team member to learn which applications can have CGTs.</p> <ul style="list-style-type: none"> • Maximum of five CGTs per application with a recommended maximum of 25 steps per tour. • An on-demand self-paced training module is included to enable customer administrators to update and support guided tours on their instances. • CGTs developed in the designated non-production customer instance, (usually the development instance) and then moved to other instances by the customer administrator. • Developed in English only (except where templates have been localized), however the customer administrator can translate tours into other languages. For more information about a current list of localized templates, please contact your local ServiceNow training contact. • Available at an additional cost. |

Custom training applications by business unit (BU)

Custom training can be purchased for the following Now Platform applications. Development and delivery are tailored to the customer's configuration of each application purchased.

The content for each CTA application, and what users learn how to do is described below:

| ServiceNow application | Business unit | Description of custom training content |
|--|---|---|
| Alert management | ITSM and ITAM | <ul style="list-style-type: none"> • Create, and manage alerts, and progress them to incidents. |
| Change management | ITSM and ITAM | <ul style="list-style-type: none"> • Create, assess, approve, and implement changes. |
| Configuration management | ITSM and ITAM | <ul style="list-style-type: none"> • Identify, record, and report on IT configuration items and their relationships. |
| Customer service management (CSM) | CSM and FSM | <ul style="list-style-type: none"> • Create, assign, track, escalate, and resolve a customer service case. |
| Field service management (FSM) | Customer Service | <ul style="list-style-type: none"> • Create, qualify, dispatch, manage, and close work orders and work order tasks. |
| Governance, risk and compliance (GRC): Audit management | Security and GRC | <ul style="list-style-type: none"> • Create, manage, and control an audit engagement and associated records. |
| GRC: Business continuity management (BCM) | Security and GRC | <ul style="list-style-type: none"> • Create, manage and validate business continuity and disaster recovery plans |
| GRC: Policy and compliance management | Security and GRC | <ul style="list-style-type: none"> • Create, manage, and control a policy statement and associated records. |
| GRC: Risk events | Security and GRC | <ul style="list-style-type: none"> • Create and manage risk events. |
| GRC: Risk management | Security and GRC | <ul style="list-style-type: none"> • Create, manage, and control a risk and associated records. |
| GRC: Vendor risk management | Security and GRC | <ul style="list-style-type: none"> • Create, manage, and control a vendor risk assessment and associated records. |
| Hardware asset management | ITSM and ITAM | <ul style="list-style-type: none"> • Differentiate between the configuration management database (CMDB) and an asset repository and how to deploy, maintain, and retire an asset record. • Manage inventory and contracts, if applicable. |
| HR case management | Human resources service delivery (HRSD) and legal service delivery (LSD) | <ul style="list-style-type: none"> • Create, manage, resolve, and close an HR case. |

| ServiceNow application | Business unit | Description of custom training content |
|---|--------------------------------------|---|
| HR enterprise onboarding and lifecycle transitions | HRSD and LSD | <ul style="list-style-type: none"> • Create, manage, fulfill, resolve, and manage lifecycle events (such as onboarding, offboarding, relocation, and more). |
| Incident management | ITSM and ITAM | <ul style="list-style-type: none"> • Create, assign, manage, track, and resolve incidents. |
| Knowledge management | All business units | <ul style="list-style-type: none"> • Create, consume, and publish information and the mechanisms for version control and approvals of articles. |
| Legal service delivery | HRSD and LSD | <ul style="list-style-type: none"> • Create, assign, fulfill, track, and resolve legal requests and matters. |
| Major incident management | ITSM and ITAM | <ul style="list-style-type: none"> • Create or propose major incidents; assign, manage, track, and resolve major incidents. |
| On-Call scheduling | ITSM and ITAM | <ul style="list-style-type: none"> • Create, modify, view, and use on-call schedules, within the context of a specified application. |
| Problem management | ITSM and ITAM | <ul style="list-style-type: none"> • Create, investigate, manage, and resolve problems. |
| Project portfolio suite (PPS): Agile development | IT business management (ITBM) | <ul style="list-style-type: none"> • Create products, releases, sprints, stories, and scrum tasks. • Use planning and execution tools and dashboards, and explore enhancements and defects, if applicable. |
| PPS: Demand management | ITBM | <ul style="list-style-type: none"> • Capture ideas and manage the backlog of demands using a structured process for submission, screening, and qualifications. • Initiate and create projects from strategic demands. |
| PPS: Project and portfolio management | ITBM | <ul style="list-style-type: none"> • Plan and execute projects as well as track project costs, effort, baseline variances, and overall performance against project goals. • Portfolio and program managers learn to group and analyze multiple projects organized in programs and portfolios. |
| PPS: Resource management | ITBM | <ul style="list-style-type: none"> • Design resource plans, perform analysis of resources' current availability and utilization, and allocate available resources to their project resource plans. |
| PPS: Test management | ITBM | <ul style="list-style-type: none"> • Manage the testing lifecycle, including test plans and suites, create tests and test cases and assign testers. • Execute tests and test cases, and record results. |

| ServiceNow application | Business unit | Description of custom training content |
|-----------------------------------|---------------------------|---|
| Release management | ITSM | <ul style="list-style-type: none"> • Create, update, approve, and close hardware and software releases. |
| Reporting | All business units | <ul style="list-style-type: none"> • Create new reports or modify existing reports. Sort, filter, and use dot-walking and multi-level filters. |
| Request management | ITSM and ITAM | <ul style="list-style-type: none"> • Create, submit, approve, and fulfill requests for goods and services defined in the service catalog. |
| Security incident response | Security and GRC | <ul style="list-style-type: none"> • Create, document, classify, distribute, investigate, and resolve security incidents. |
| Software asset management | ITSM and ITAM | <ul style="list-style-type: none"> • Plan, request, approve, source, allocate, manage, support, and retire software assets. • Explore contracts, entitlements, remediation, optimization, and normalization, if applicable. |
| Vulnerability response | Security and GRC | <ul style="list-style-type: none"> • Identify, classify, remediate, and mitigate vulnerabilities. |

Custom process user training phases

With the purchase of custom training services, ServiceNow training and adoption leads plan, organize, and manage the following project phases with key stakeholders from the company.

See the [ServiceNow provided resources](#) and [Customer required resources](#) sections for more details about phase stakeholders.

| Actions and outcomes | Inputs, outputs, and requirements |
|---|--|
| <p>Training kickoff (virtual)</p> <ul style="list-style-type: none"> ServiceNow presents the customer with custom training plan to confirm deliverables, consult on delivery options, and propose delivery timeline. | <ul style="list-style-type: none"> The training timeline is agreed upon between the customer and ServiceNow, based on the overall implementation and go-live plan and available resources. ServiceNow requires a minimum of two weeks per application for which training is ordered to create customized training materials. Additional time can be required if additional deliverables (such as recorded demo videos (RDVs), CGTs, ODCs or QRCs) are purchased or if special requirements are requested. This is determined at the discretion of the ServiceNow training and adoption lead and is mutually agreed upon with the customer. Additional time can be required to complete training content if there are any delays in the technical implementation of the application or if customer requests additional implementation enhancements or if an application has been heavily customized. An additional kickoff may be required for CGT, or on-demand-course projects. |
| <p>Training development scoping sessions (virtual)</p> <ul style="list-style-type: none"> ServiceNow facilitates one scoping session for each application for which training was ordered. The scoping session is an opportunity for the customer to walk through custom configuration and workflows in the customer's instance. ServiceNow records the scoping session and uses it internally when developing custom training materials. | <ul style="list-style-type: none"> The customer provides a process lead and technical resource who can provide details on the customer's configured application. The customer is responsible for the definition and documentation of the business processes within the scope of the training. The customer, in consultation with the ServiceNow training engagement manager, is responsible for identifying the Now Platform environment in which the scoping session takes place. Configuration must be complete or nearly complete (95% and above) in the selected environment and business processes must be clearly defined, such that the customer can demonstrate the full lifecycle of a record in the purchased application, as it appears to students at go-live. An additional planning session is required for CGTs to plan the tours and can be required for ODC projects. |

| Actions and outcomes | Inputs, outputs, and requirements |
|---|--|
| <p>Custom training development (virtual)</p> <ul style="list-style-type: none"> • ServiceNow creates training materials (see Deliverables section) using information from the scoping session and the customer's configured Now Platform instance. • ServiceNow provides a draft of the training material to the team identified in the kickoff session. • For CGTs, ServiceNow create scripts for each tour. | <ul style="list-style-type: none"> • ServiceNow custom training is intended for standard configured applications for process user audiences. Any training requests for nonstandard applications, customizations or UI changes are assessed on a case-by-case basis and either might not be supported or covered under standard pricing. • The customer provides the appropriate access to the customer's configured instance for the ServiceNow content developer(s). • Access must be provided no later than the time of the scoping session to avoid delays. • Implementation of the application must be frozen when training materials are developed and when training is delivered. • Development can be extended or postponed at the ServiceNow content developer's discretion if configuration is incomplete or exceptionally customized. • For CGT packages, scripts are created for each CGT in Microsoft Word format for review and sign-off by the customer's process owner. |
| <p>Training content review session(s) (virtual)</p> <ul style="list-style-type: none"> • ServiceNow facilitates one review session for each application for which training was ordered. • ServiceNow revises training material based on customer feedback and provides final training materials. | <ul style="list-style-type: none"> • The customer reviews the draft documentation provided by the ServiceNow training and adoption lead(s) and provides consolidated feedback one business day before the review session. • ServiceNow understands the need to be flexible. As such, we allow up to three iterations of customer feedback before we finalize content. • Additional reviews to the written content can be required for CGTs and ODC projects. • Following review and revision, no additional changes are made to the training materials. The customer assumes any risk associated with making changes to the customer's instance between finalizing the training materials and delivering the training. The customer is responsible for any changes to training materials after the review and revision. • ServiceNow works with you to accommodate the best possible training delivery date, based on content completion and resource availability. Please note that any delays to these stated content review and feedback schedules can result in delays to the training delivery or CGT development. |
| <p>Training logistics session</p> <ul style="list-style-type: none"> • ServiceNow holds one or more training logistics sessions with the customer, as needed, to coordinate training delivery details. | <p>The customer, in consultation with ServiceNow, is responsible for coordinating training delivery logistics, including, but not limited to:</p> <ul style="list-style-type: none"> • Determine required attendees for each session and disseminating training invitations in a timely manner. • Determine the number of sessions required and the schedule for each session. • Secure (if applicable), a physical training room for each session and ensuring the appropriate technical setup is provided. • Create a training schedule. |

| Actions and outcomes | Inputs, outputs, and requirements |
|--|---|
| <p>Training delivery session(s)</p> <ul style="list-style-type: none"> • ServiceNow delivers training sessions (see Deliverables section) based on finalized training materials, in the customer's configured instance for each application for which training is ordered. | <ul style="list-style-type: none"> • Training materials must not be modified one week (five business days) before the first day of training delivery. • Training must be delivered using only the finalized training materials and customer instance as agreed upon during the review session. • Note: Training materials are delivered on ServiceNow-branded templates. • Any updates to the training material following training delivery are the sole responsibility of the customer unless additional training development is purchased separately. • Training materials are delivered in virtual formats. Any printing recommended for onsite training is the responsibility of the customer. • The instance in which the training demos and student hands-on exercises are conducted must be frozen for the duration of the training rollout. • We strongly recommended that a customer's process owners attend all training sessions to answer internal process questions that arise during the training session(s). • Training sessions are limited to the maximum number of attendees as indicated by ServiceNow. • ServiceNow uses Zoom as their virtual meeting tool for all virtual class delivery. The customer must test access to Zoom to determine any issues before the delivery of the training as ServiceNow instructors cannot troubleshoot any Zoom access or other issues at the time of training. • Navigate to zoom.us/test, join a test meeting, and check if the audio works properly. This ensures participants can attend the meeting without any issues. • Recording of content is strictly prohibited on both virtual and onsite sessions unless specific written permission has been granted by ServiceNow. |
| <p>Custom guided tour (CGT) development</p> | <ul style="list-style-type: none"> • Following sign-off of the CGT scripts, the ServiceNow CGT developer builds the tours in the customer's non-production instance, based on the signed-off scripts. • The customer's administrator grants access to the developer to build tours and sets up an update set for the development of the tours. • The customer then tests all CGTs with the appropriate user role(s) required for access to the tour. |

Pitfalls to avoid when training process users

Training process users is a critical part of any ServiceNow implementation because training ensures that they are confident using the platform and are prepared to make the best use of ServiceNow capabilities. As you design your ServiceNow PUT program, avoid these six common training pitfalls:

| Pitfall | |
|-------------------|---|
| Pitfall | Rush through planning and content creation. |
| Resolution | <ul style="list-style-type: none"> • Begin planning for training early in the implementation • Creating customized content, reviewing and finalizing materials, and preparing internal trainers takes a few weeks • Defer content creation until the platform is near production-ready to ensure that your content accurately mirrors what is in the production instance |
| Pitfall | Misaligned training and implementation timelines. |
| Resolution | <ul style="list-style-type: none"> • Move out the training timeline if you move out the implementation timeline • Do not underestimate the time it takes to create and deliver training materials • Squeezing training into less time negatively affects the user experience and adoption |
| Pitfall | Lack of ownership. |
| Resolution | <ul style="list-style-type: none"> • Assign someone to own training as a full-time role • Training requires significant coordination and planning • Ensure success by having a dedicated owner willing to work cross-functionally, especially if the implementation affects multiple teams |
| Pitfall | Not understanding the location of process users. |
| Resolution | <ul style="list-style-type: none"> • Identify the physical locations of process owners that require training early in the rollout so you can best tailor training delivery for them • For example, via live sessions, eLearning courses, and genius bars • The earlier you identify these locations, the better you can plan. |
| Pitfall | Absence of a dedicated instance. |
| Resolution | <ul style="list-style-type: none"> • Dedicate an instance that closely mirrors production to training, so that your users have an environment in which to practice • Avoid development work in this instance during training to ensure a consistent and positive user experience • Take screenshots from this instance for training content |
| Pitfall | Treat training as a one-off activity. |
| Resolution | <ul style="list-style-type: none"> • Prioritize ongoing training and skill development so that your process users build a comprehensive set of skills and knowledge and to drive adoption • Training should extend beyond meeting initial rollout requirements |

Custom train the trainer (TTT) FAQs

| FAQ | |
|-----------------|---|
| Question | What is train the trainer (TTT) and how does it differ from process user training (PUT)? |
| Answer | <p>TTT is a method for teaching the employees of a customer to become trainers so that they can then teach other employees how to use the ServiceNow applications that the customer is implementing.</p> <p>TTT differs from PUT in the following ways:</p> <ul style="list-style-type: none"> • Content: Includes additional content on teaching methodology, tips, and best practices. A slide deck with this content is part of the TTT offering. • Time: TTT (for one application) is a full-day course. • Participants: Limited to ten. Participant involvement in teach backs and peer feedback is a key component of the course. |
| Question | When is TTT a good fit for a customer? |
| Answer | When the customer has a large number of process users but does not want to use ServiceNow CTA to deliver training to all of them. |
| Question | How many people can attend train the trainer? |
| Answer | The CTA team recommends no more than ten attendees. |
| Question | Can TTT be delivered virtually? |
| Answer | <p>Yes. TTT can be delivered virtually or face to face.</p> <p>For virtual deliveries, 'breakout rooms' can be used to allow trainees to deliver teach-backs to a small group of peers, depending on group size.</p> |
| Question | A customer would like to condense TTT into half a day; can this be done? |
| Answer | We do not recommend this approach. However, if a customer wants only half a day, the session reverts to the content delivery and practical exercise component without the TTT and teach-backs. |
| Question | Do you have guidance on who to send to a TTT session? |
| Answer | Yes. We created this CTA TTT flyer to help customers understand the qualities of a good trainer and identify suitable candidates. |
| Question | Does the customer need to decide up front if they want to take a TTT approach? |
| Answer | No. From a sales point of view, the customer gets one day of training delivery when they buy content development. They can use this for TTT or PUT, or a combination when there are multiple processes in scope. Customers can discuss this with the CTA PM assigned to the project, and they can recommend an approach once the project has started. |

ServiceNow provided resources

ServiceNow provides the following resources for each custom training process purchased where applicable.

A single person can fulfill multiple roles or multiple people can fulfill a single role.

| ServiceNow resource | Responsibilities |
|-----------------------------------|--|
| Training and adoption lead | <p>Primary engagement point of contact for Adoption Accelerator and Change Enablement packages.</p> <p>Facilitates the overall project plan, including scoping, development, review, and delivery.</p> <p>Consults with the customer on best practices for training development and delivery.</p> <p>To ensure your optimal requested start date for custom training and change enablement packages, we recommend requesting resources at least eight to twelve weeks before the project state date.</p> <p>Resource request guidelines are as follows:</p> <ul style="list-style-type: none"> • PUT: request resources four to six weeks before content development starts; or at the start of the last development sprint (prior to the start of User Acceptance Testing.) • Adoption Accelerator and Change Enablement packages: request resources at the start of your ServiceNow implementation. <p>Customers have up to three business days to confirm ServiceNow custom training proposed delivery dates.</p> <p>All custom training content is provided in English and on ServiceNow-branded templates.</p> |
| Content developer | <p>Drafts the training material content for the ServiceNow applications purchased based on a scoping session with the customer.</p> <p>Incorporates feedback from the customer to finalize training material.</p> |
| Custom training instructor | <p>Delivers finalized training material, including presenting key content and live demonstrations in the customer's configured instance of ServiceNow.</p> |
| CGT developer | <p>Develops the CGTs in the customer's non-production instance, ensuring to develop into the appropriate update set which has been set up by the customer's administrator.</p> |

Customer required resources

The customer provides the following resources and ensures active participation to enable successful training. A single person can fulfill multiple roles or multiple people can fulfill a single role.

| ServiceNow resource | Responsibilities |
|-----------------------------|--|
| Executive sponsor | Provide timely decisions on overall project plan, including deliverables and timeline. |
| Project manager | <p>Manage day-to-day project activities, including, but not limited to:</p> <ul style="list-style-type: none"> • Identify and communicate with customer resources. • Facilitate scheduling for scoping and review sessions. • Act as a liaison between technical and training teams in regard to the overall implementation. • Create a training schedule in conjunction with the ServiceNow lead. • Identify customer training attendees. • Coordinate physical or virtual training logistics. • Send invitations to trainees for any scheduled training sessions. |
| Training lead(s) | <p>Anyone who provides input to or feedback on the training materials must participate in the process. In the event that project deliverables are not reviewed and signed off by the customer by specific dates, the deliverable timeline and training delivery dates can be affected.</p> <p>The customer's participation in developing the custom training plan and materials is critical for aligning deliverables with the customer's processes and training objectives.</p> |
| Process owner(s) | <p>Lead scoping sessions by providing details about business processes and customized applications for which training has been ordered.</p> <p>Provide an end-to-end demonstration of the configured application in the appropriate customer instance, or for CGT packages, demonstrate the steps in each of the five guided tours for their application.</p> |
| Technical resource | <p>Support scoping sessions by providing technical expertise around the system configuration.</p> <p>Facilitate access to the customer instance for ServiceNow training resources and internal training attendees.</p> |
| Change lead(s) | <p>For change enablement packages, this resource is responsible for executing internal change plans within the customer organization, rallying support and identifying additional resources as needed.</p> <p>This resource often has change management, training and/or internal communication expertise.</p> |
| System administrator | For CGT development, this resource enables guided tours in the customer instances, creates update sets for the ServiceNow guided tours developer to create the tours into, logs support ticket for defects or issues as needed, and moves guided tours between customer instances. |