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WORK at LIGHTSPEED™

CAB Workbench – Modernizing the Change Advisory Board

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Agenda

- What is the CAB Workbench?
- Why was it built?
- Who can use it?
- Key Concepts
- Demonstration

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Speaker Introduction



NAME: Jason Occhialini

TITLE: Senior Product Manager

FUNCTION: ITSM Product Manager

COMPANY: ServiceNow

EXPERIENCE: More than two decades of IT Operations & IT Service Management experience

EXPERTISE: ITIL Service Transition & Service Operations processes

ACHIEVEMENTS: Direct involvement or oversight in more than 100 ServiceNow® customer implementations. Product owner responsible for Guided Setup, ITSM Guided Setup, CAB Workbench & the new SLA Timeline (Kingston) features

CURRENT PROJECTS: Product Owner for Change Management & Service Level Management

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Session Overview



Objectives

- Understand what the CAB Workbench is, why it was built, and how it can benefit your organization



What You Will Learn

- What is the CAB Workbench & how can it benefit you?
  - How to use the CAB Workbench to schedule recurring CAB Meetings
  - How to plan CAB Meetings with CAB Workbench
  - How to conduct CAB Meetings with CAB Workbench

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What is the CAB Workbench?

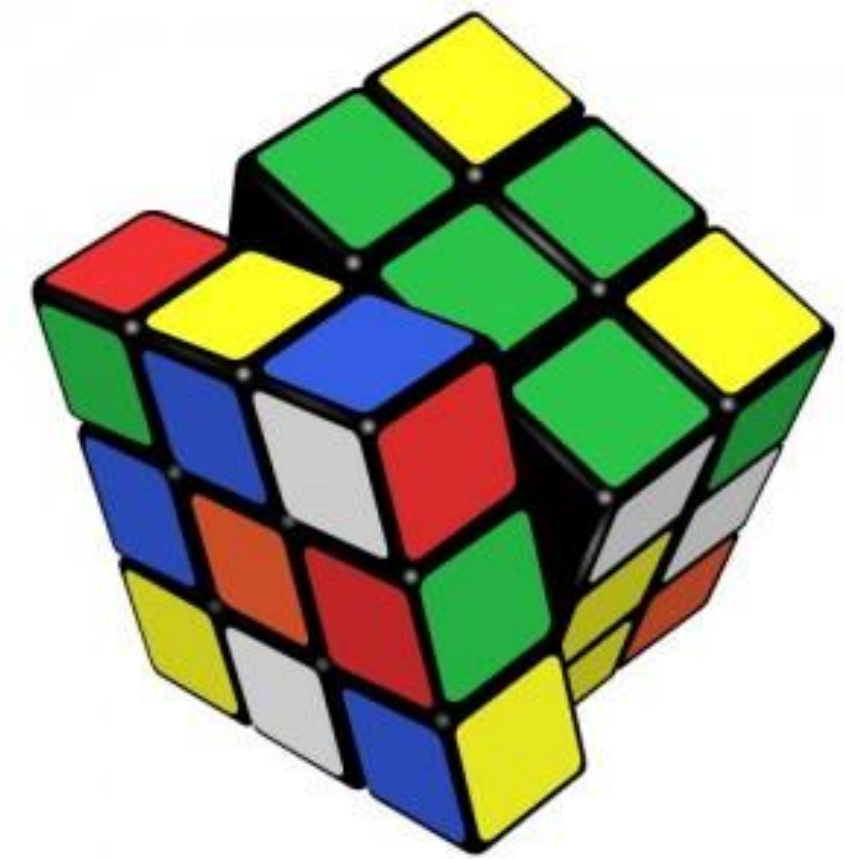
- The Change Advisory Board (CAB) Workbench is a dedicated feature of the Change Management application to schedule, plan, and manage CAB Meetings all within the ServiceNow® platform



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CAB Workbench – Why was it Built?

- Prior to CAB, the vast majority of ServiceNow customers used one of two platform tools to plan and manage their CAB Meetings
  - Filtered lists
  - Reports of type list
- Scheduling was done outside the platform
- Attendee lists had to be manually generated
- 3rd party conferencing tools used to accommodate remote locations



We knew we could deliver a more efficient and engaging experience!

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CAB Workbench – Benefits

Automate Manual Tasks

Automatically generate

- Meeting occurrences
- Meeting agendas
- Attendee lists
- Meeting invitations and responses

Increase Productivity

- Time management aids keep meetings on schedule
- Attendees can set notifications so they only attend when needed
- One click approvals

Single System of Engagement

- Schedule, plan and manage CAB Meetings on the NOW platform™
- Conduct CAB Meetings in portals, built on ServiceNow's Service Portal
- Visualize impact & risk in a contextual Change Calendar

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CAB Workbench – Key Structures

- CAB Definition
  - Similar to a recurring meeting invite where attributes are defined all meeting occurrences inherit
  - A schedule is associated to a meeting series definition allowing the automatic generation of CAB Meetings
- CAB Meeting
  - A meeting occurrence automatically generated from the CAB Definition it's related to. Inherits attributes from the series (definition), but can be modified, as needed
- CAB Agenda Items
  - List of change requests automatically associated with a CAB Meeting that will be discussed during that CAB Meeting
- CAB Attendees
  - List of attendees automatically generated and invited to a CAB Meeting occurrence. Included CAB Manager, board and users associated with change requests being discussed

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CAB Workbench – Who Can Take Advantage of It?

- Anyone with rights to the Change application
- Works with any change process
- Works with the newer or legacy state model (pre-Geneva)
- Supports multiple levels of review, CABs of CABs, etc.



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How to Enable CAB Workbench

- Enabled by default on instances provisioned on Istanbul
- Customers upgrading to Istanbul can enable CAB Workbench by activating the plugin:
  - Change Management - CAB Workbench
- New role introduced for CAB Managers
  - Role for users who will schedule, plan and manage CAB Meetings
  - role name = sn_change_cab.cab_manager

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CAB Workbench – Demo

- Let’s take a look at how to schedule, plan and manage CAB meetings using the CAB Workbench!

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Top Takeaways

1

Bring your entire CAB Meeting experience into the NOW platform™

2

Schedule once and reap inherent efficiencies including automated generation of meeting agenda's, attendee lists & meeting invitations

3

Deliver a more engaging meeting experience and save time by allowing attendees to attend only when needed

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Thank You

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Thank You

Jason Occhialini

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