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WORK at LIGHTSPEED™

Starting Over With ServiceNow… From ServiceNow

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REI

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servicenow

Speaker Introduction



NAME: Tim Ruzicki

TITLE: Senior IT Service Management Engineer

FUNCTION: IT Service Management

COMPANY: REI

EXPERIENCE: ITSM professional with over 20 years of experience

EXPERTISE: Application administrator, developer, and architect, and a process designer and strategist

ACHIEVEMENTS: Implemented ServiceNow multiple times, including internationally, and has spent the past seven years working with the platform

CURRENT PROJECTS: Currently works on REI's ServiceNow team as a Senior Engineer

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About REI



NAME: REI

INDUSTRY: Outdoor Recreational Retail

MARKET FOCUS: The co-op is committed to offering our members affordable, high quality gear, and meaningful outdoor experiences

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: REI, Recreational Equipment, Inc., was founded in 1938 by a community of climbers in search of quality outdoor gear. More than 78 years and 149 stores later, our passion lies in inspiring, educating and outfitting our more than 6 million active members and customers for a lifetime of outdoor adventures and stewardship.

A passionate advocate for the outdoors, REI is committed to creating access to inspiring outdoor places across the country. The co-op partners with nonprofit organizations to invest in the infrastructure that makes life outside more accessible to the community. In 2015, more than $8.5 million went back to nonprofits, including large grants for the National Parks' centennial and to increase women's leadership in the outdoor industry.

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Session Overview



Objectives

- Learn from REI's successes and missteps about how to "reset" your ServiceNow implementation



What You Will Learn

- Understand the potential ROI of "Starting Over"
- Discover the different approaches
- Hear the path REI chose to climb
- Learn what we'd do differently with the knowledge we have now
- Walk away with the key considerations for success

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Agenda – Climbing Reset Mountain



- Planting our Flag: What We Accomplished
- Sizing Up the Mountain: What our challenges were
- Planning the Route: Looking at the options
- Gearing Up: How we prepared
- The Climb: The work we did
- The After-Action Report: What we learned

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Planting Our Flag – Hurray, We're on Top of the World!



- Increased customer satisfaction with faster response time
- Improved usability with a new Service Catalog
- Increased employee productivity by streamlining existing processes

- Reduced our development backlog by ~280 items
- Reduced 100 custom tables, and over 200,000 old records
- Removed/retired six custom applications

200k+

Positioned ourselves for success with shorter upgrades, increased compatibility with future releases and features, and greater standardization of existing code

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Sizing Up the Mountain – the Challenges We Faced

Customized Old School Code

- Implemented in 2009
- Inefficient code: lots of client side scripting
- Most out-of-box objects had been modified

Inability to Modernize

- Heavy usage of custom applications
- Because we “owned” so much code, newer platform solutions didn’t work
- Upgrades would take 2 to 3 months

Increasing Technical Debt

- Our backlog kept growing
- Adding Band-Aids over Band-Aids
- It was impossible to understand the true scope

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But Wait…There's More!



Legacy Data and Objects

- Stale, unused records caused latency and administrative overhead
- Unused custom fields, tables and code objects made support difficult

Security and Access Issues

- "Super Secure" VPN Tunnel…that nobody knew about
- Not on the High Security Plugin

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Planning the Route: Our Three Options

Option 1

Upgrade in Place

Upgrade in place, install the High Security Plugin, and revert to OOB code where possible

Option 2

Start Over with No Data

Start over on a completely new system, with minimal configuration changes and no legacy data

(ServiceNow recommended approach)

Option 3

Start Over with Data

Start over on a completely new system, with legacy data and the changes necessary to support that data

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Key Considerations Before Choosing Option 1, 2, or 3

We had to keep our data



- Financial data (time cards, project, portfolio data)



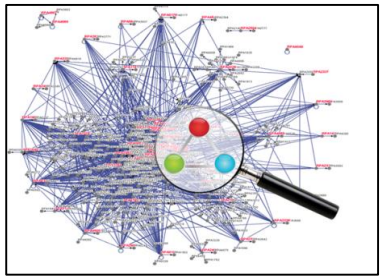
- Audits of Change Requests



- Audits of Catalog Requests



- HR Service Desk data



- Referential data

We couldn’t impact our customers with too much change at one time

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So We Picked…Option 3: Do the Hardest Thing…

1. Stand up new Production and Development instances
2. Migrate the data we wanted to retain
3. Rewrite or migrate customizations necessary to support the legacy data

Option 3

Start Over with Data

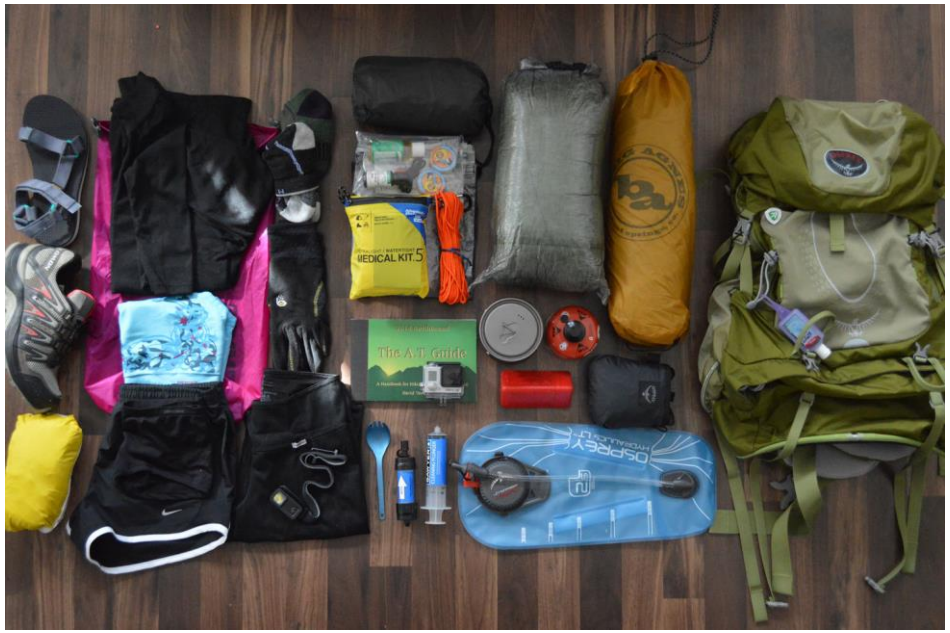
Start over on a completely new system, with legacy data and the changes necessary to support that data

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Gearing Up: How We Prepared

Our Goals:

- Modernize and get to the latest version
- Future-proof, minimize customizations
- Use best practices and modern Dev standards
- Reduce our technical debt
- Improve performance
- Improve user satisfaction
- Document changes and the new architecture



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Planning the Ascent

Create Reference Docs for Each Table

- Dictionary entries
- Business processes
- Security rules
- Referential information
- Application and Module menu considerations

Redesign the Service Catalog

- Make it more user-friendly
- Remove order guides
- Make use of collapsing sections

Rethink Our Core Tables

- Users, Groups, and Locations

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The Climb

Safety First (Security)

- Replaced our VPN Tunnel with SAML for authentication and LDAP through a MID Server for AD data
- High Security Plugin turned on by default

Climber Focused (Usability)

- Designed a standard form layout for all forms
- Re-architected the Service Catalog
- Added operational improvements in core apps

The Right Route (Dev Processes)

- Rewrote inefficient code according to modern practices
- Made heavy use of Fix Scripts to test and modify data

Better Intel (Data)

- Retained OOB states
- Built in automation to inactivate users
- Updated our Groups structure
- Improved our Location data

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Data Migration – The Heavy Lifting

Engaged Covestic, an REI Partner, to Migrate Data

Core Foundation Data

- XML Migration of Users to retain sys_ids
- Normalization of Locations and Departments
- XML CMDB Migration

Ticket Data

- XML migration initially to retain sys_ids &references
- Analyzed custom fields to either
  - Recreate
  - Re-map
  - Leave behind
- Approvals moved via XML

Data Transformation

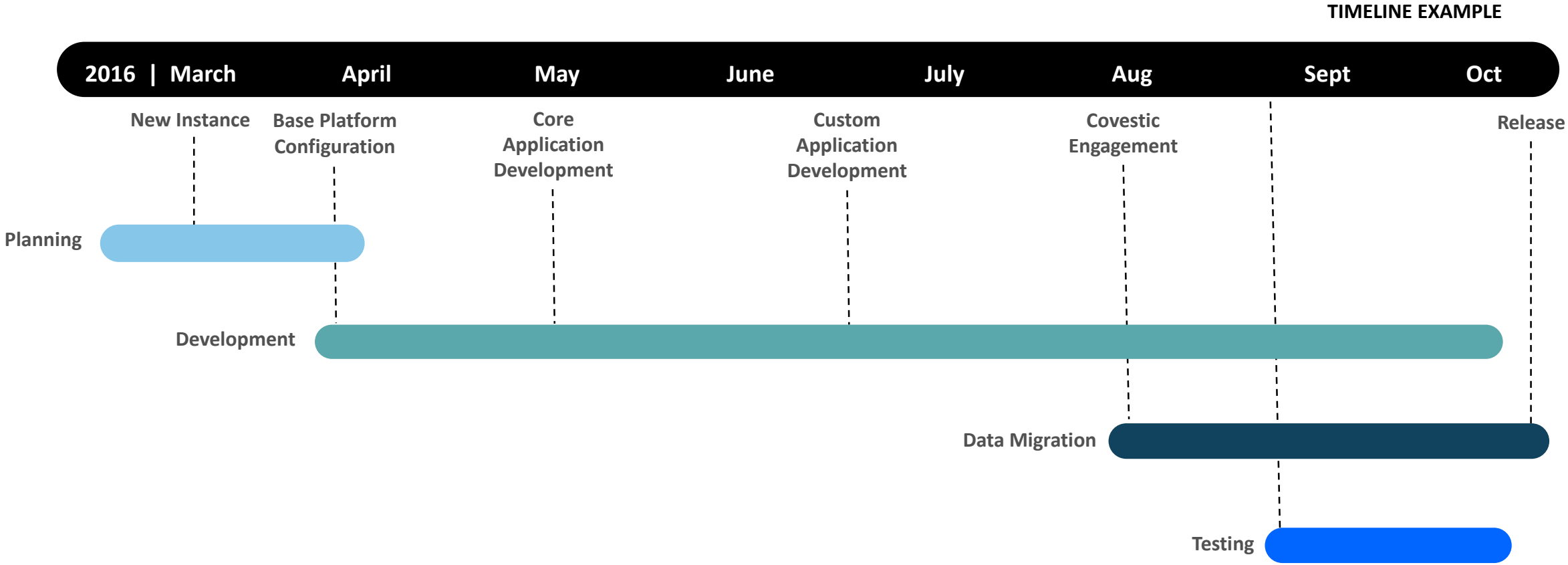
- Post XML data migration, used transform maps to correctly set:
  - New States
  - Locations
  - Groups
  - Custom field translations

Workflows (Change/Catalog)

- Change Requests – new workflow to start midway
- Inactive Catalog – migrated tasks & created reporting tables for variables
- Active Catalog – scripted re-submission as new

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Solution – Timeline



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After-Action Report: What We Learned

More Planning… LOTS More Planning

- Better planning around the data migration
- Perform a side-by-side analysis of fields in the new system
- Do a deeper dive into which tables contained data

Better Data Preparation

- Clean and normalize data to the new values before migrating it
- Retire and remove old records before migrating

Better Testing

- Build detailed test plans before you start developing and migrating
- Use QA resources to spread the burden of testing

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More Lessons We Learned…the Hard Way

Know Who's Using Your System

- Audit emails and logs
- Survey your users about custom integrations

Pay Attention to Notifications

- Pay attention to notifications and subscriptions… they're different now!

Be Careful Changing Security Models

- Make a plan for every table
- Test, test, test

Make This Effort a Real Project

- Have a PM, a detailed project plan, and realistic expectations of the resources
- Dedicate the resources to make the project a success!

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We Learned a LOT of Lessons…

Communication is Key

- Publicize and Advertize
- Share frequent progress reports
- Let folks know why you're going into a cave for 4-8 months…and that you'll return!

Consider Scoped Apps

- If you're old school, you won't like them.
- Allows for distributed development
- Helps prevent the return of issues you just resolved

Instance Management

- Work with SN to stand up a new Prod/Dev pair
- Carefully plan around your instance name, including URLs
- Keep a copy of your old system for a year

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Top Takeaways

1

Create a Project Team with Executive Sponsorship

2

Create a Plan and gain buy-in from stakeholders

3

Test, test, test.

And have dedicated testers

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Q & A

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