knowledge17

WORK at LIGHTSPEED

BRE4367 – How EY used performance analytics to reduce workload and increase proactive planning

Hollie Gregg
Assistant Director ESM Metrics and Reporting EY

© 2017 ServiceNow All Rights Reserved

servicenow

Agenda

- EY's ESM Reporting Landscape January 2015
- Implementing Change – Migrating from Excel to PA – It Takes a Process
- ESM Process Changes and Projects – Integrating Reporting into Scope and Requirements
- EY's ESM Reporting Landscape March 2017

© 2017 ServiceNow All Rights Reserved

Speaker Introduction

Name: Hollie Gregg

Title: Assistant Director – Enterprise Service Management (ESM) Metrics and Reporting

Function: KPI Subject-Matter Advisor, Design, Develop and Implement Dashboards in PA

Company: EY (Ernst and Young LLP)

Experience: 10 years as an Information Technology Service Management (ITSM) Process Owner, 2 years as a ServiceNow Owner/Admin, 2 years as a Performance Analytics (PA) Administrator

Knowledge: ITSM Processes, Metrics and key performance indicators (KPIs)

Achievements: Reduced production of excel-based reports by 40%

Current Projects: Driving process efficiencies, automating reporting, defining new and better ways to measure processes

© 2017 ServiceNow All Rights Reserved

My Company



Company-wide Initiatives

- Cost efficiency
- Speed of development/deployment/quality
- Responsiveness to customers/partners/other teams
- Regulatory compliance

© 2017 ServiceNow All Rights Reserved

Objectives and What You Will Learn

Objectives

- Bring your company's ITSM, HR Knowledge, Asset, etc. Reporting out of the dark corners of Export Transfer and Load and into the light with PA

What you will learn

- Understand the resistance to let go of the spreadsheet
- Learn how to help your customers articulate their business needs in ways other than "I want these 2,700 fields for the last 3 years of incidents"
- Gather key lessons related to PA
- Discuss how the lessons may apply to you for your initiatives/projects

© 2017 ServiceNow All Rights Reserved

Context – Setting the Stage

Industry Trends

- Growing customer expectations for access to metrics and KPIs where they do their work
- Automation
- Single vision – one source of truth

Breaking Old Habits

- Legacy reports
- Dependence on Excel
- Push for analytics

Enterprise Service Management Goals

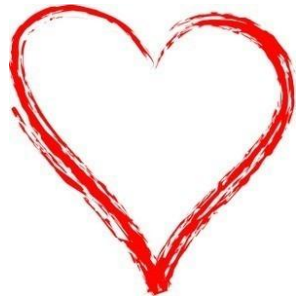
- Reallocate man-hours from copying, pasting and running macros to analysis of data and continuous improvement
- Getting out of the PowerPoint business

© 2017 ServiceNow All Rights Reserved

Adoption Challenges

- People LOVE Excel
  - Data
  - Pivots
  - Charts
  - Formulas
  - **CONTROL**
- People HATE Change
  - Indicators
  - Breakdowns
  - Widgets
  - It’s a whole new world
  - With a lot less control









© 2017 ServiceNow All Rights Reserved

It Takes a Process…

Changing Hearts…and Minds

- Explain
  - Pros of PA
  - Demo, Demo and Demo again
  - Documentation
- Expose
  - Champion/Feedback Forums
  - Corporate Social Media
- Enable
  - Targeted Training Demos
  - Use Case Illustrations
  - In-Person Awareness and Training Sessions

© 2017 ServiceNow All Rights Reserved

It Takes a Process…

Employ the Process

- Walk Through Target Report
- Walk Through New Dashboard
- Solicit Use Cases and Feedback
  - How do you use this report today?
  - Explain how the dashboard meets the need
  - Document the scenario
- Trigger Cooldown Period
- Announce Retirement
- Communicate, Communicate, Communicate

© 2017 ServiceNow All Rights Reserved

Champion Forum

Agenda

- In Person Sessions – Call for Invitees
  - Alpharetta
- Report Retirement Updates
  - Daily SD L2 Reports – Q4 FY17 (tentative)
- Performance Analytics Development Update
  - Plan and Schedule
- PA Job Reorganization
- Process Changes with Reporting Impacts
- Feedback Forum
  - Call for topics!
- Questions, requests, demos
- Homework ☺
- Thank You!

© 2017 ServiceNow All Rights Reserved

Champion Forum

PA Plan and Tentative Schedule for FY17

- Next Targets for Retirement
  - Q4 FY17
    - Daily SD Level 2 Reports
      - Configuration complete
      - Reviewing new requirements
      - Retirement Kickoff – April
- Recently Implemented
  - EYK Measures
  - Mercury
  - Secure Hub
  - Skype Warranty
- New Development
  - Q4 FY17
    - FY17 KPI Measures (cont'd)
    - GSD (cont'd)
    - CMDB Health Dashboards
    - Warranty Dashboard (tent.)
    - EY Knowledge Dashboard

© 2017 ServiceNow All Rights Reserved

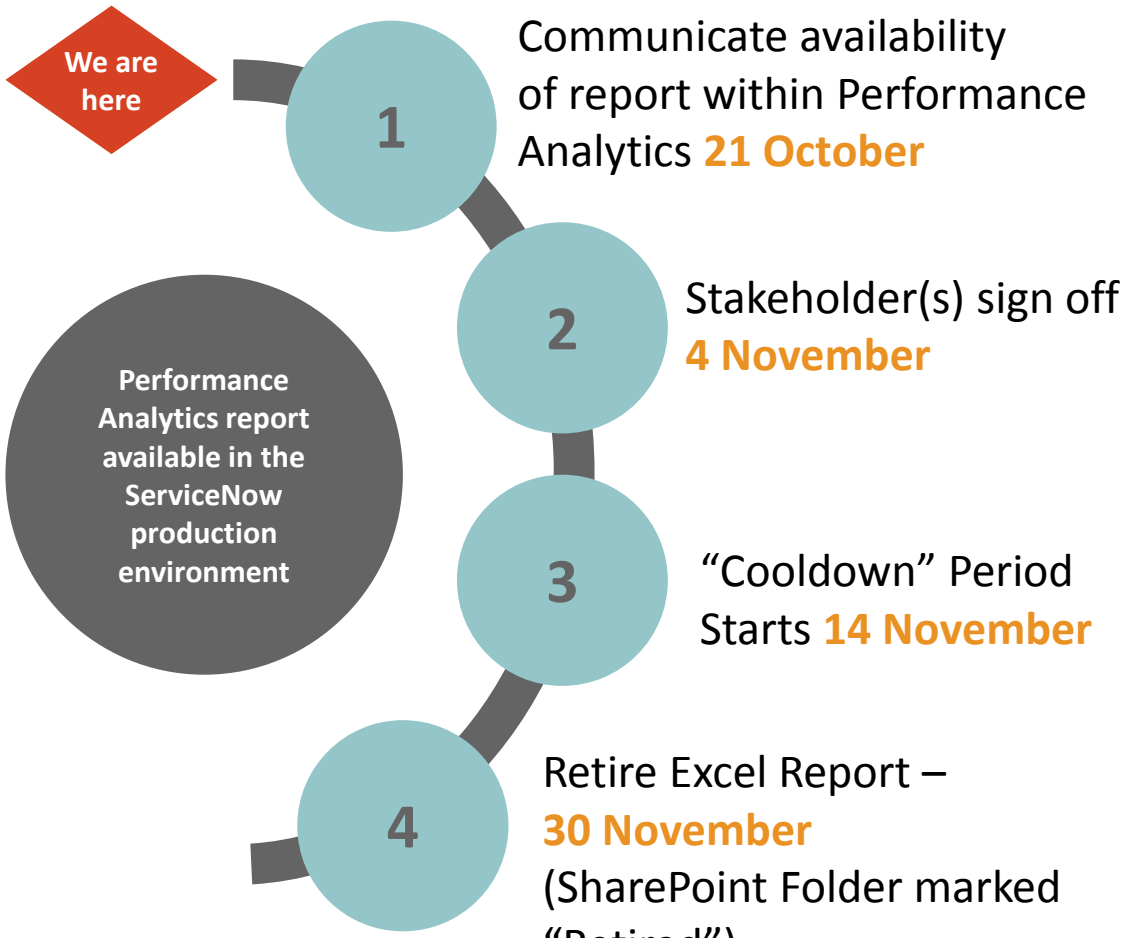
Champion Forum

Homework ☺

- SHARE, SHARE, SHARE the details around the new dashboards with your organization so there are no surprises when the excel reports are no longer produced. This forum is the main channel for distributing details regarding report retirement please:
  - Share what we have spoken about with your teams
  - Direct them to the documentation that can be found here
  - Participate in our Yammer! Group
- Submit requests for discussion topics for this forum
- Submit names of people you know would like to attend a virtual PA session or and in person session in Trivandrum, Wroclaw or Alpharetta.
- Submit use cases for FAQ documents

© 2017 ServiceNow All Rights Reserved

Report Retirement Process

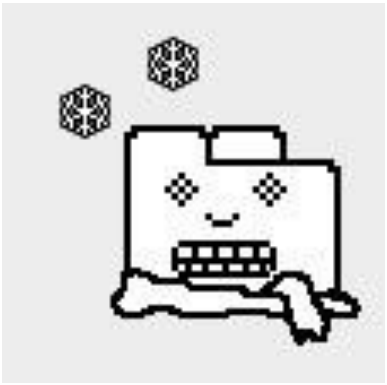


- Notification is scheduled to be sent to stakeholders on 21 October
- Sign-off due from stakeholders 4 November
- Official communication and call for feedback to be sent 21 October
  - Feedback due 29 October
  - We will use the feedback window and some of the cooldown period to address the identified concerns
- Cooldown period 14 November through 25 November
- Retirement – Potentially 30 November

© 2017 ServiceNow All Rights Reserved

Reporting Requirements? What does that mean?

- Old reporting requirements:
  - (List of Every Field on Form)
  - All incidents created from 2010 to 2017
  - Delivered everyday to 300 people
  - ServiceNow's response



Too many rows

Too many cells

Query timed out

Kill me now…

© 2017 ServiceNow All Rights Reserved

Reporting Requirements? What does that mean?

- New reporting requirements:
  - Identify behavior or trend you would like to measure
  - Identify the population of records which represent the behavior
  - What does success look like?
  - How often do you expect a successful result?

Reporting is typically an afterthought

Bringing it to the forefront of the project or initiative allows for better maneuverability in PA

© 2017 ServiceNow All Rights Reserved

Top Takeaways

1

People LOVE Excel and hate change but can be led in the right direction through multiple exposures on multiple medias to adopt new ideas.

2

Reporting requirements are not an afterthought – they must be discussed and documented at the onset of a project.

3

PA provides one source of truth and saves time, sanity and your inbox.

© 2017 ServiceNow All Rights Reserved

Q&A

© 2017 ServiceNow All Rights Reserved

Take the Survey

Please take a moment to complete a session survey in the Knowledge17 app.

Thank You

Hollie Gregg
Assistant Director ESM Metrics and Reporting EY

© 2017 ServiceNow All Rights Reserved