knowledge17

http://clabs.link/lab132010

WORK at LIGHTSPEED

Performance Analytics 101: Now You See It!
Performance Analytics Essentials

Dan Kane
Customer Success Manager – Performance Analytics
ServiceNow

Matt Dodd
Advisory Solution Consultant
ServiceNow

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Agenda

- What is Performance Analytics?
  - Lab 1.1: Activate a Content Pack
- The Data Layer
  - Lab 2.1: Collect Analytics Data
  - Lab 2.2: Indicator Scorecards
- Data Visualization
  - Lab 3.1: Dashboards and Widgets
  - Lab 3.2: The Workbench Widget
- In-Form Analytics
  - Lab 4.1: Working with In-Form Analytics
- Customizing the Data Layer
  - Lab 5.1: Automated Indicators
  - Lab 5.2: Formula Indicators
  - Lab 5.3: Automated Breakdowns

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Speaker Introduction



Name: Dan Kane

Title: Customer Success Manager

Function: Analytics and Reporting

Company: ServiceNow

Experience: 4 years with ServiceNow, 3 years as a Business Process Consultant implementing Performance Analytics; 20+ years managing IT operations environments

Expertise: Analytics, ITSM, Management Coaching

Achievements: Completed 25+ implementations of Performance Analytics

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Speaker Introduction



Name: Matt Dodd

Title: Advisory Solution Consultant

Function: Helping customers get value from ServiceNow!

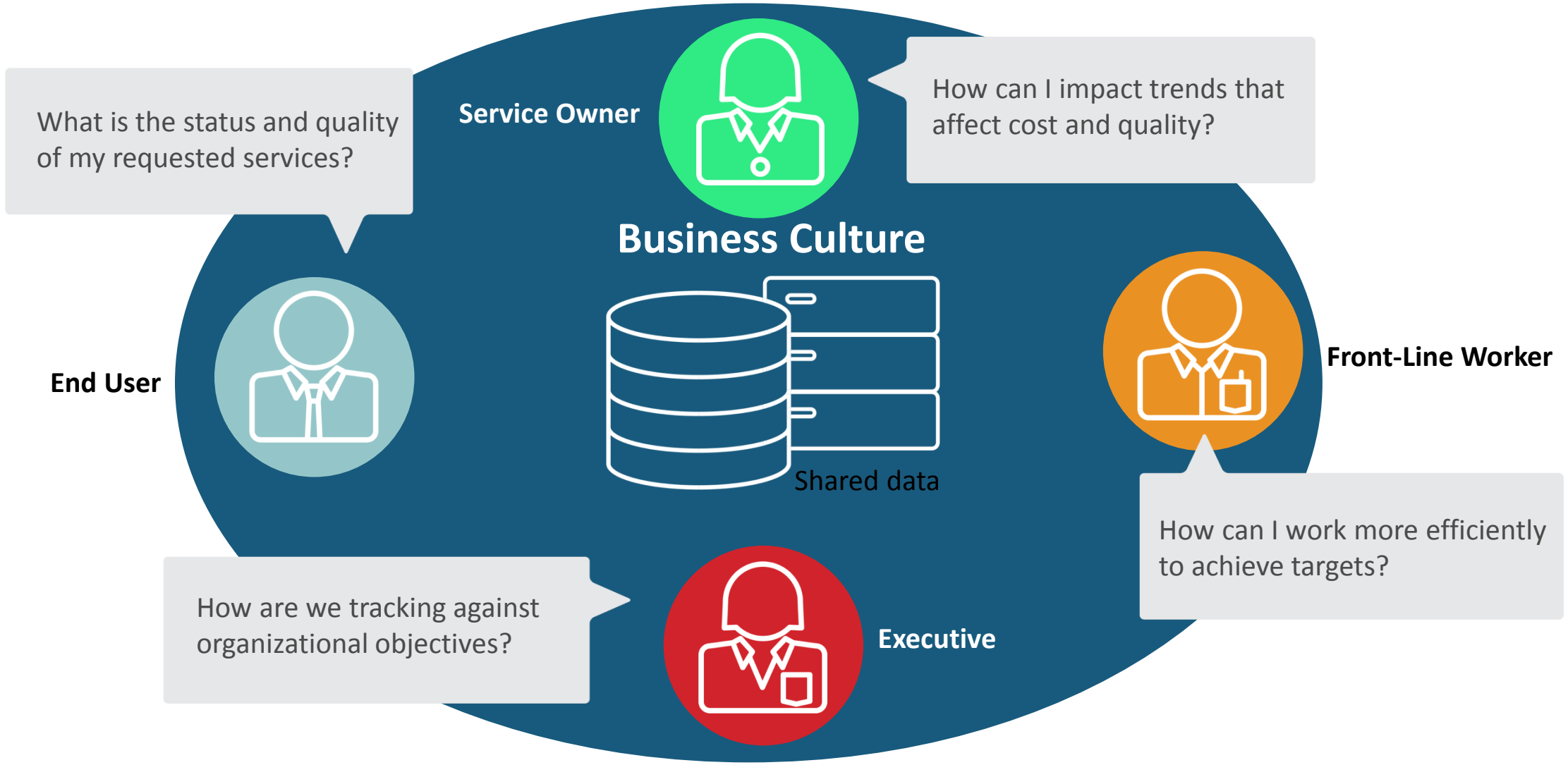
Company: ServiceNow

Experience: 4 years with ServiceNow spent broadly across the entire platform, plus many years of building reporting, analytics, and BI solutions for organizations and customers

Expertise: Reporting, Analytics, Platform

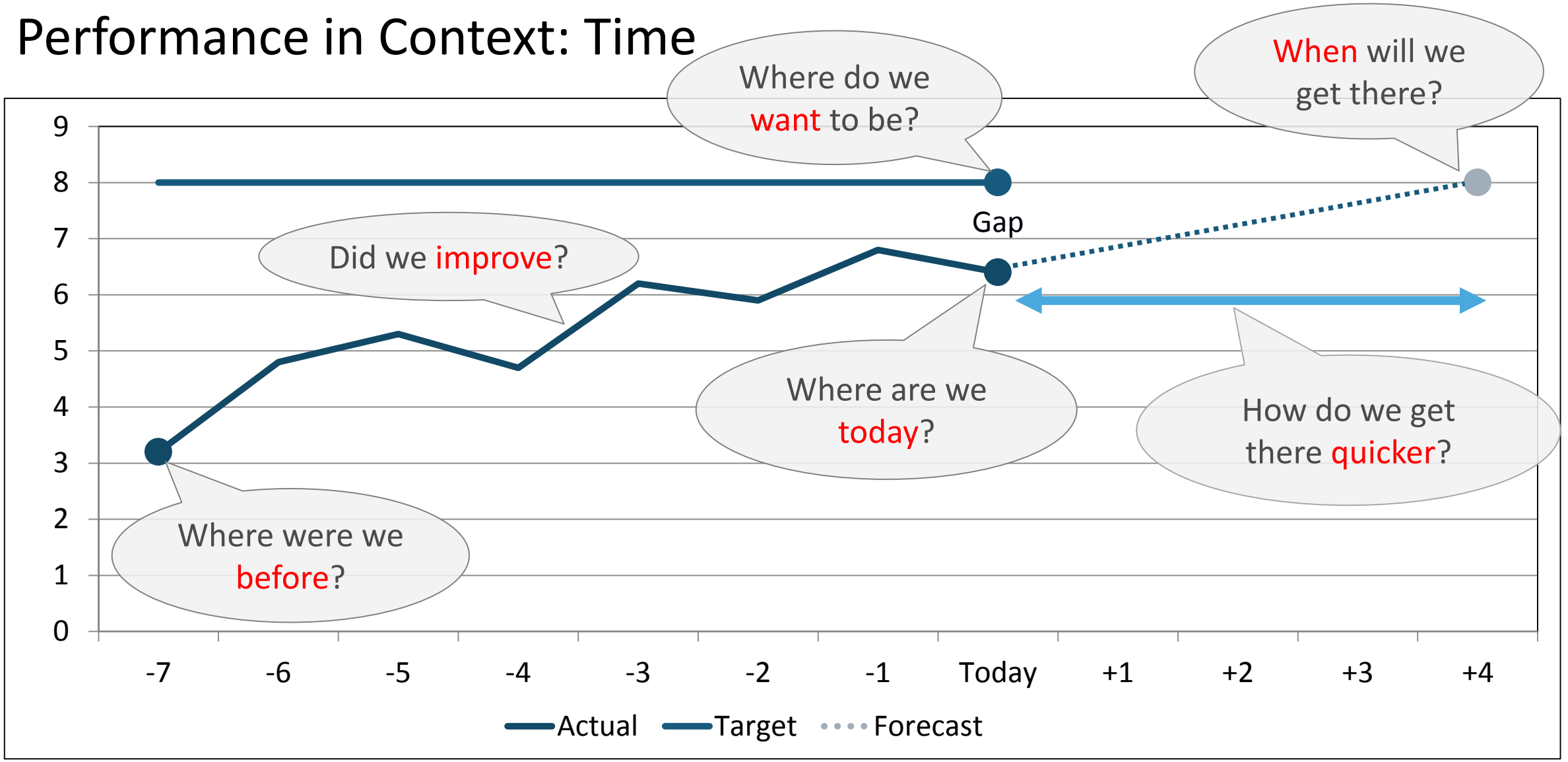
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Performance in Context: People



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Performance in Context: Time



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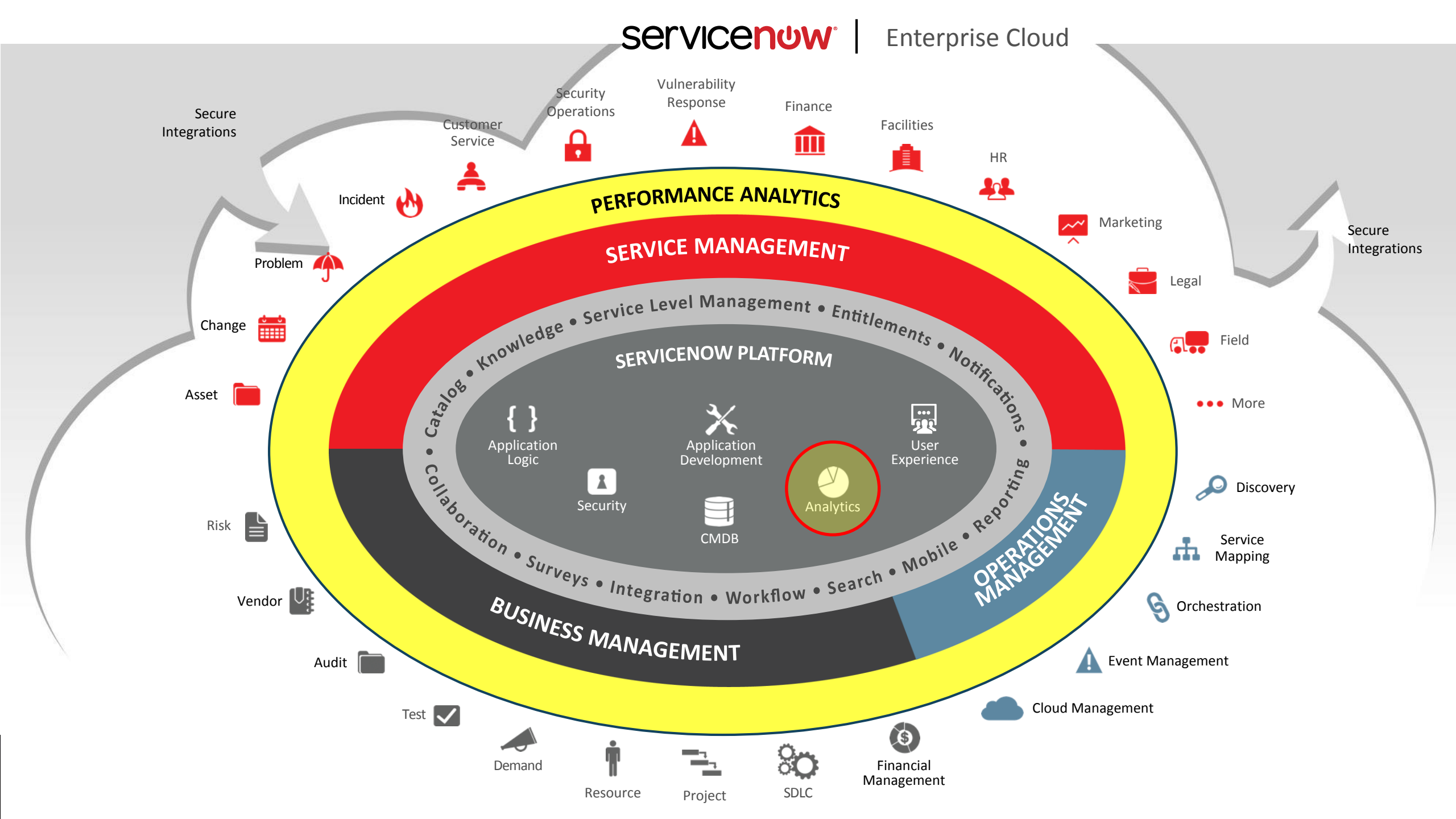
Performance in Context: Influence



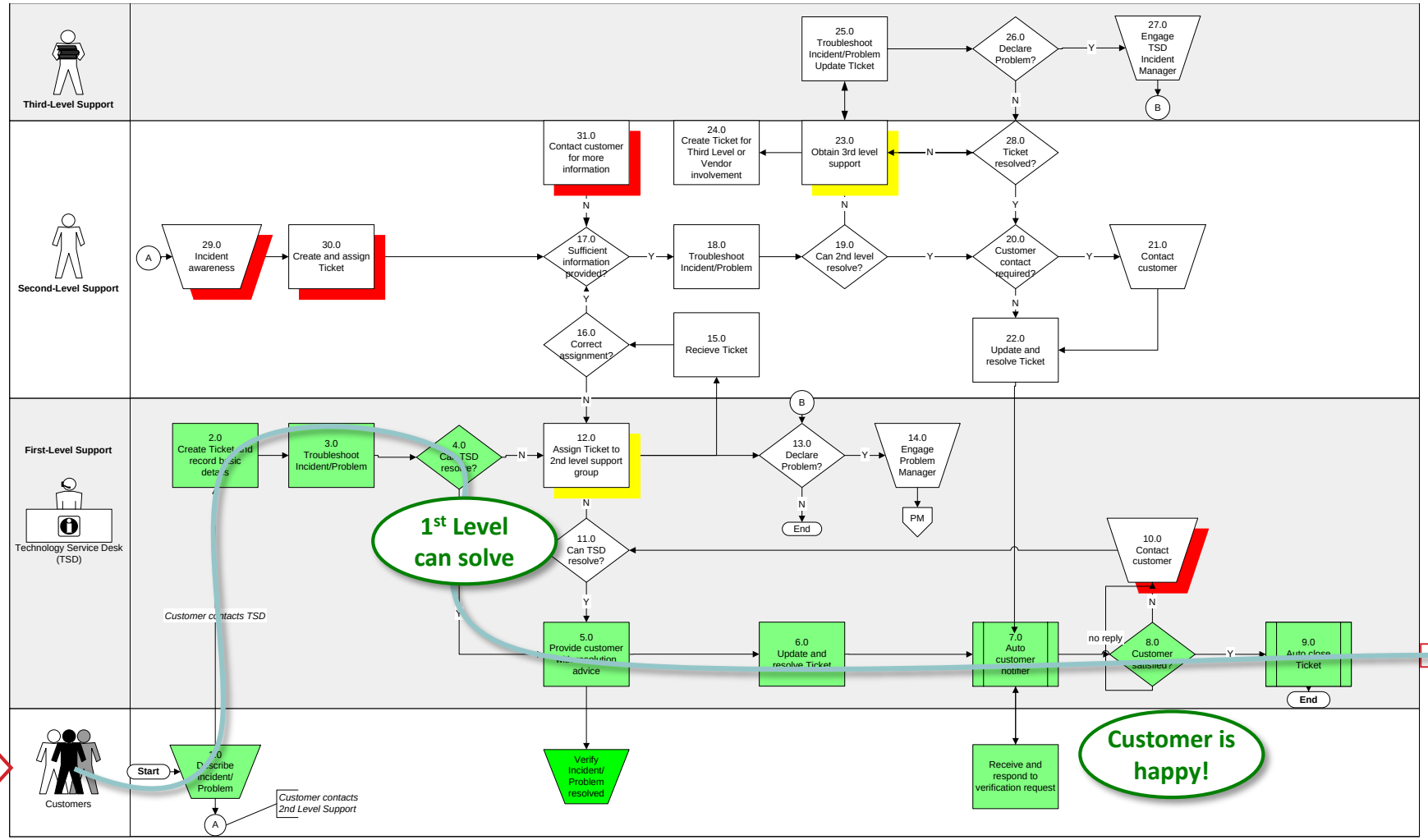
"Data without context is just organized information."

– Albert Einstein

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Secure Integrations
Customer Service
Security Operations
Vulnerability Response
Finance
Facilities
HR
Incident
Problem
Change
Asset
Risk
Vendor
Audit
Test
Demand
Resource
Project
SDLC
Financial Management
Marketing
Legal
Field
More
Discovery
Service Mapping
Orchestration
Event Management
Cloud Management
Secure Integrations
PERFORMANCE ANALYTICS
SERVICE MANAGEMENT
Catalog • Knowledge • Service Level Management • Entitlements • Notifications •
SERVICENOW PLATFORM
Application Logic
Application Development
User Experience
Security
CMDB
Analytics
• Collaboration • Surveys • Integration • Workflow • Search • Mobile • Reporting
BUSINESS MANAGEMENT
OPERATIONS MANAGEMENT

Identifying Areas for Improvement with Structured Workflow

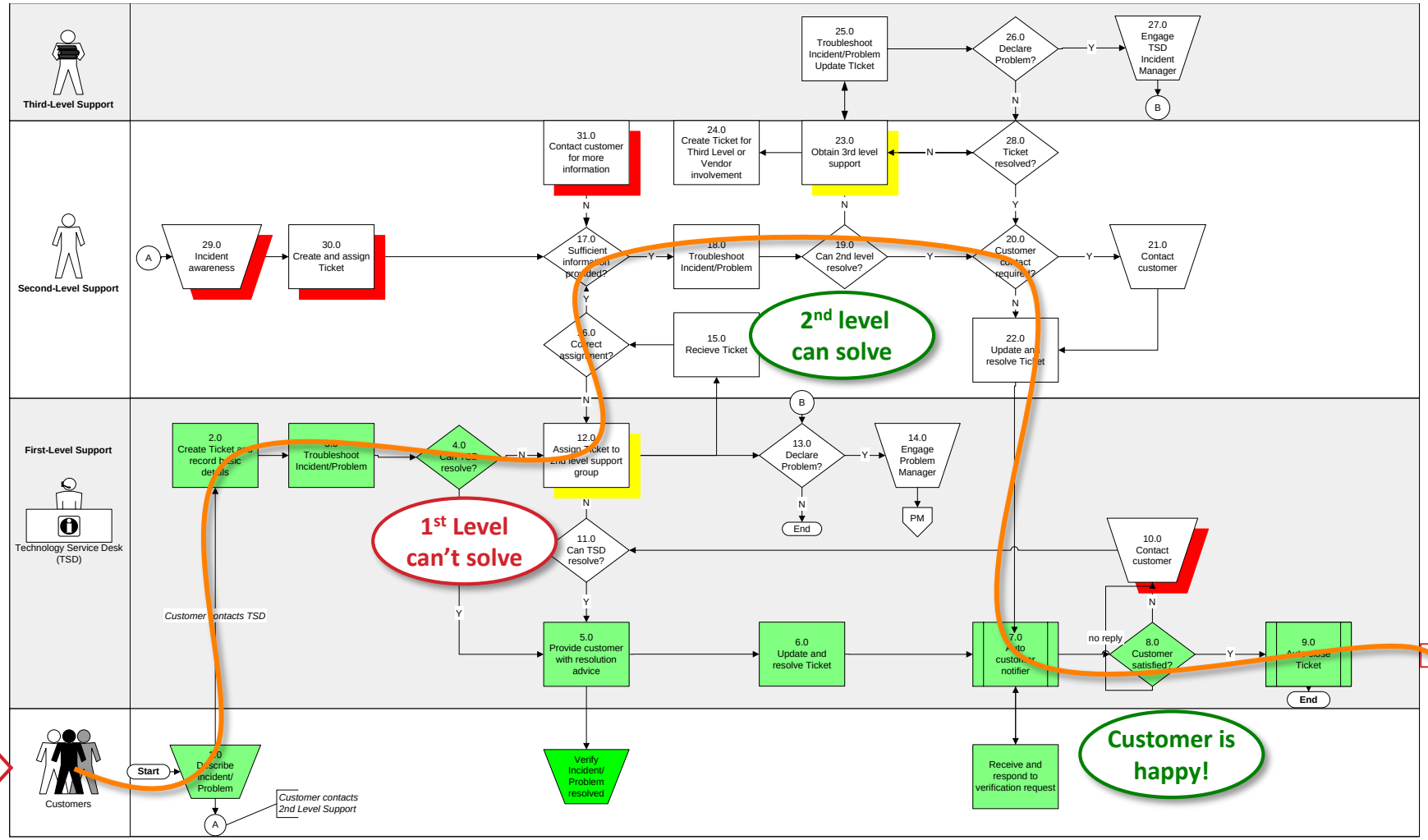


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1st Level Cannot Solve: Increased Workload, Resources, Time

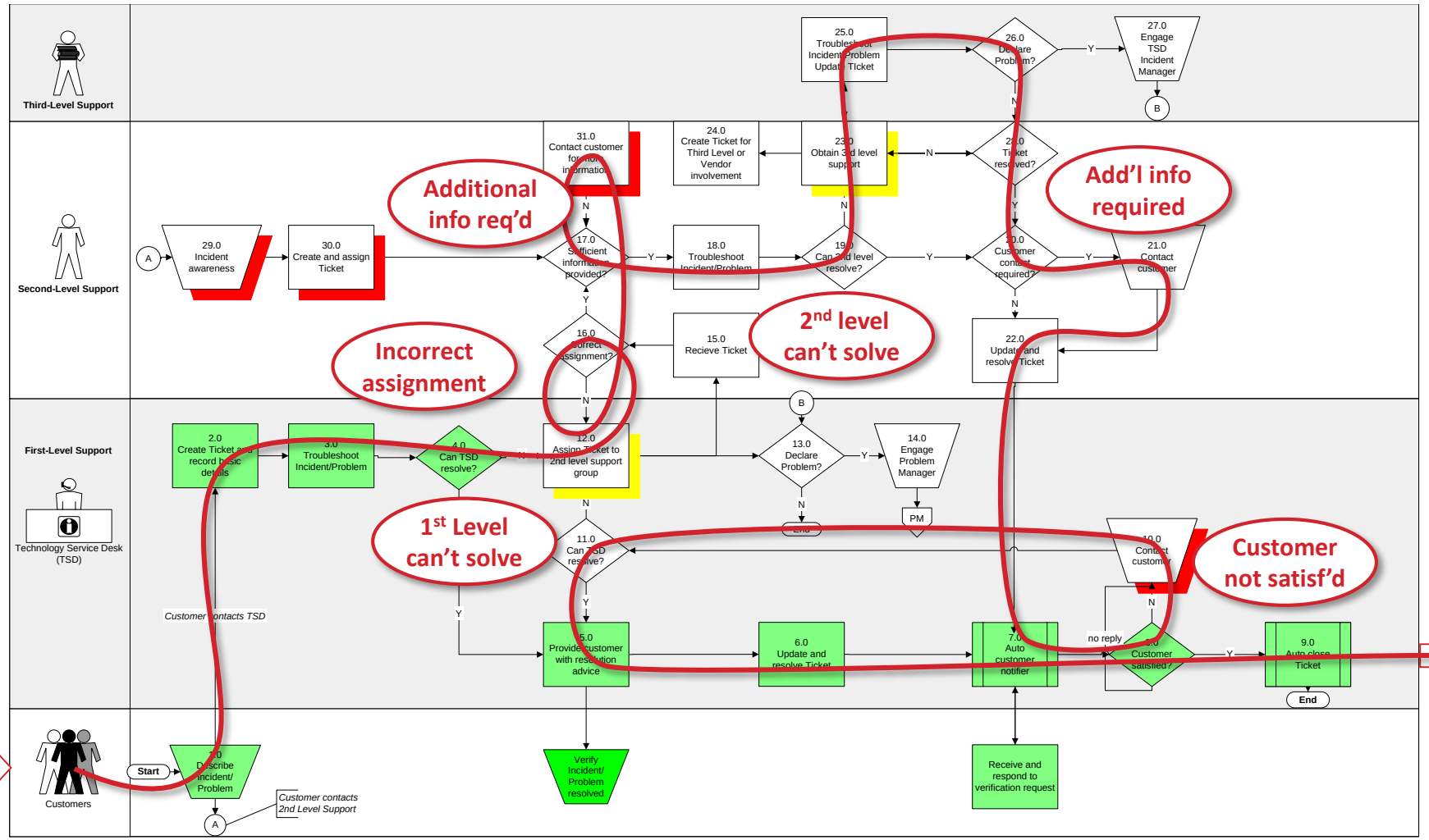


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Every Feedback Loop Increases Workload, Resources, and Time



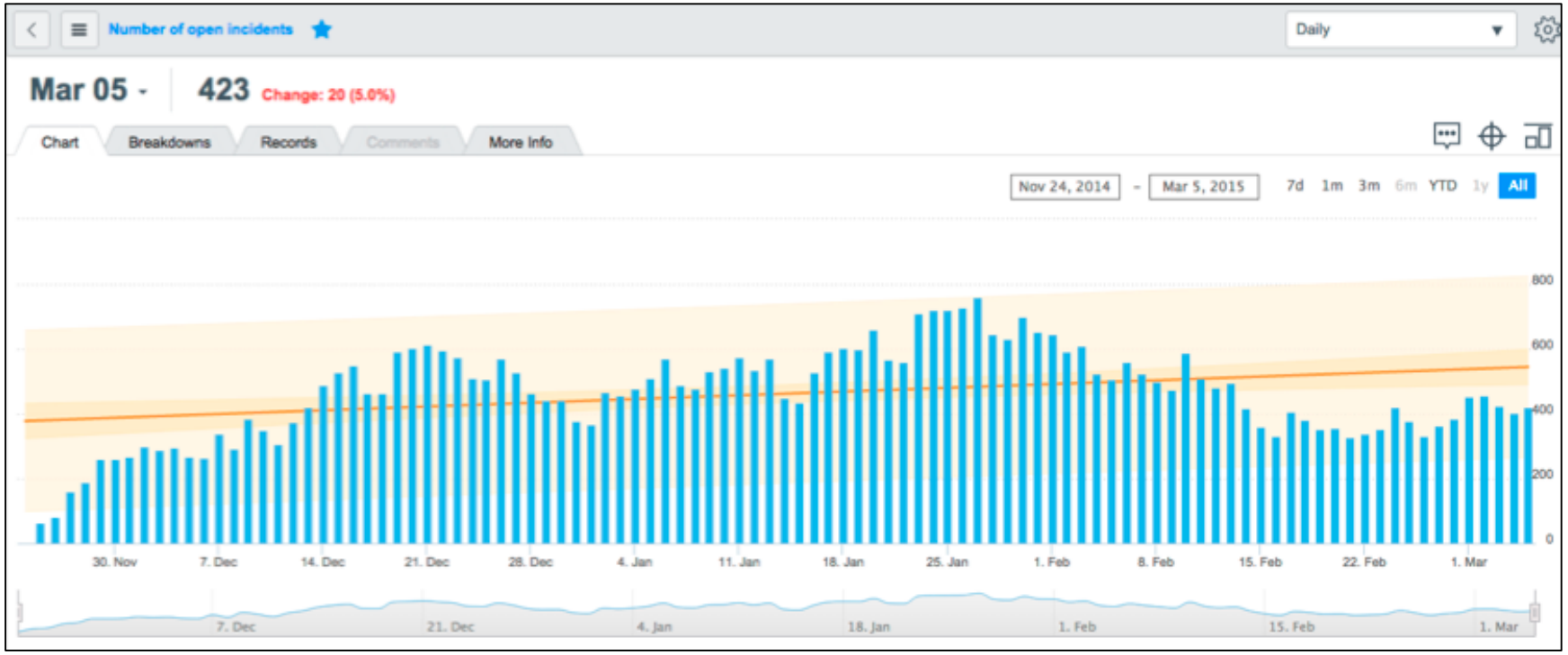
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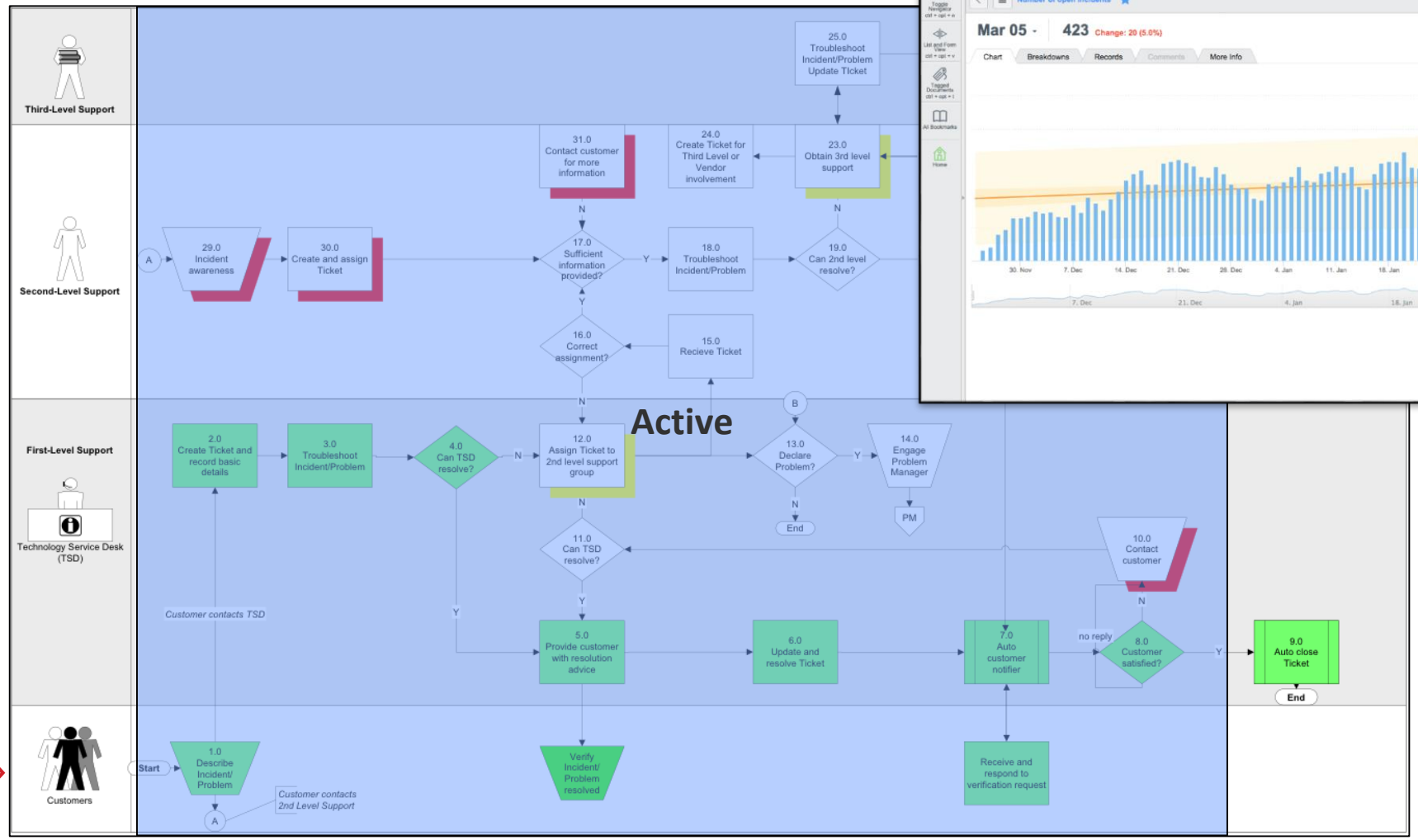
Analyzing Open Incidents

The increase of tickets is clearly visible, but why?
We need to break it down.



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What is Being Looked At?

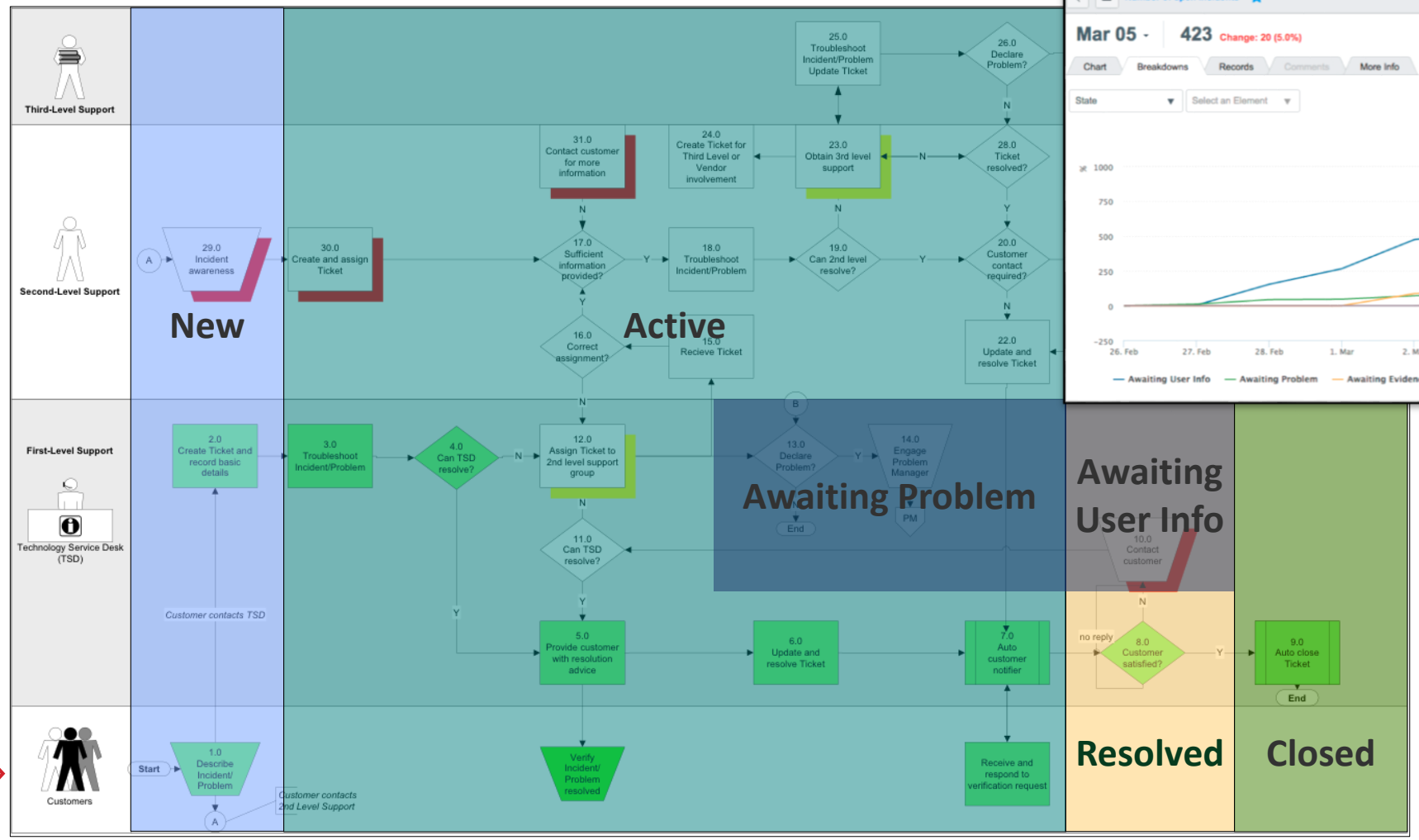


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Breaking it Down



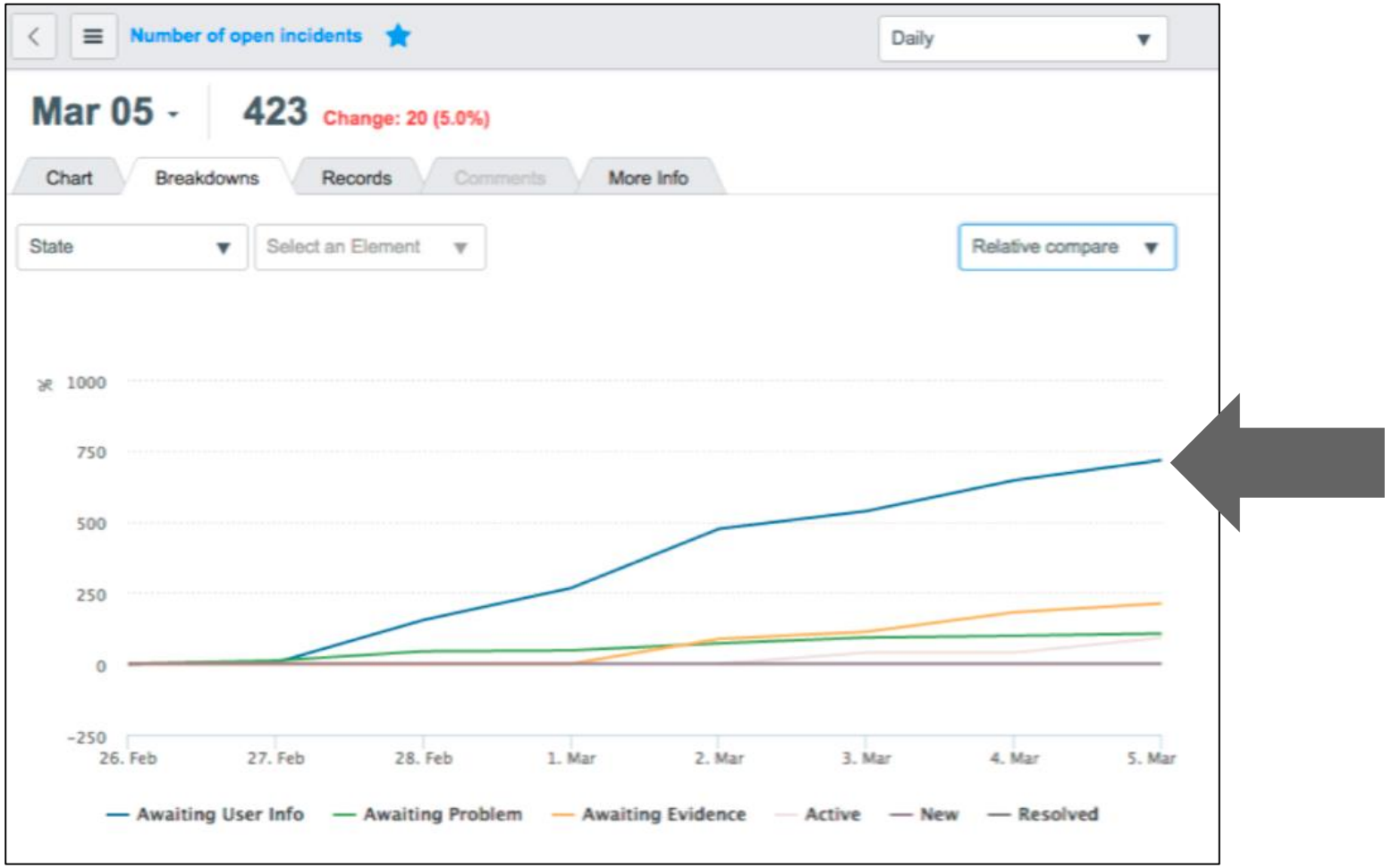
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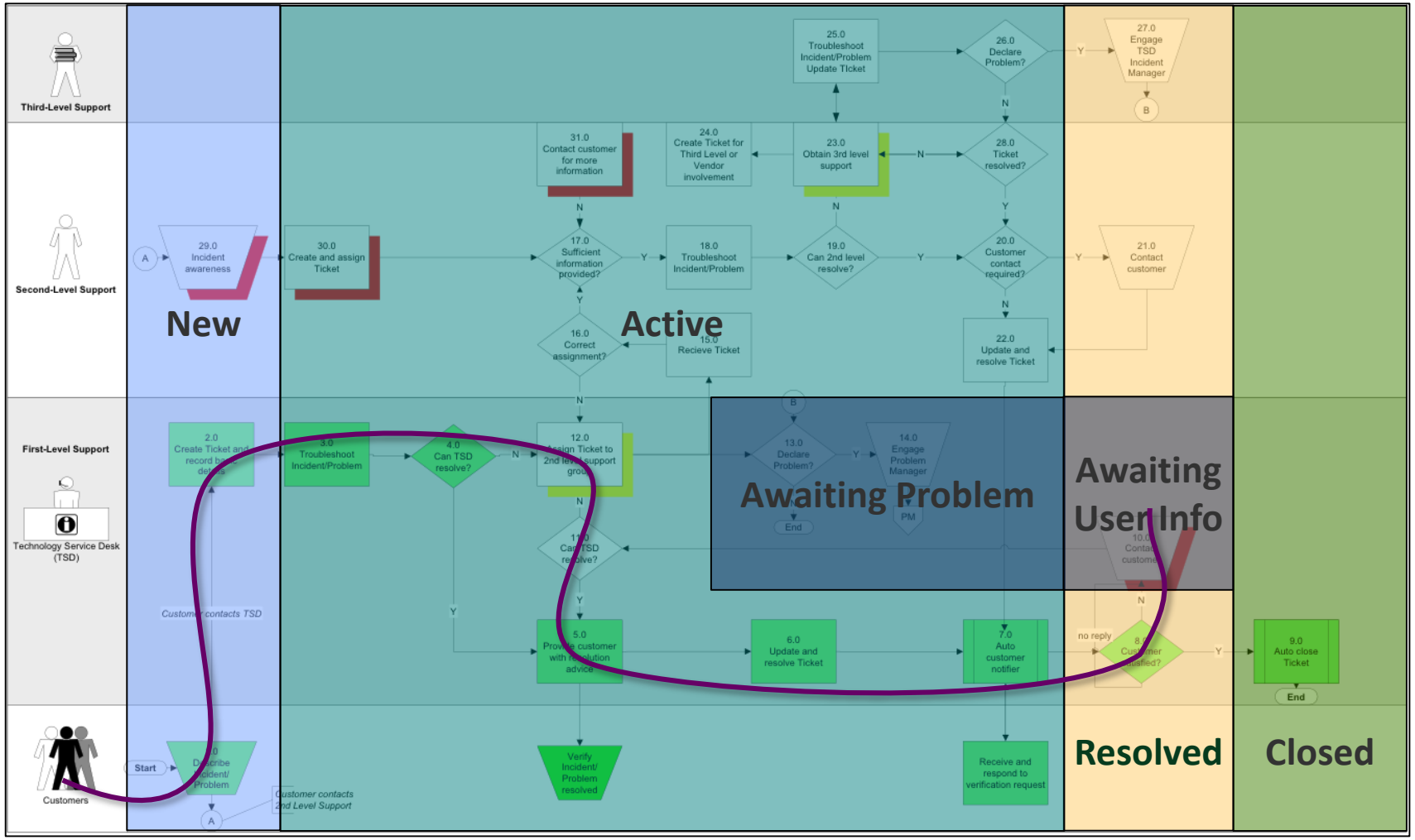
Examining a Sample Process

Too much time in “Awaiting user info”!



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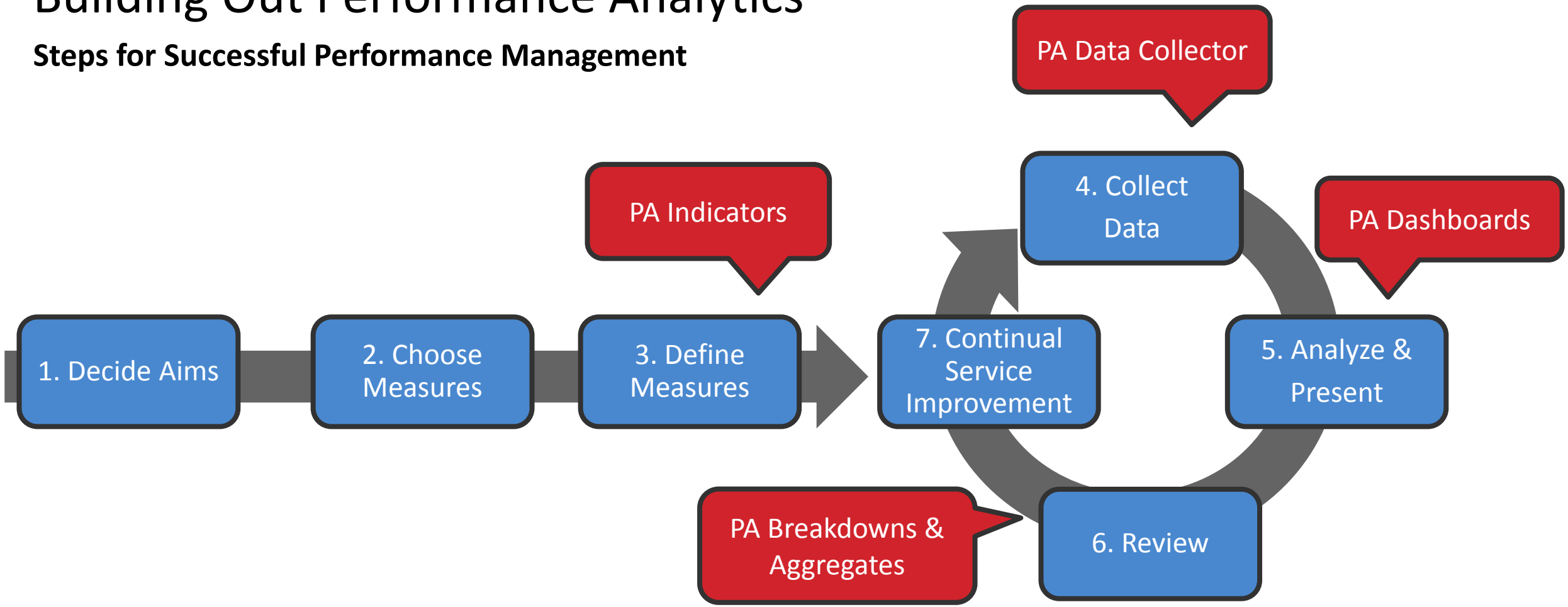
Seeing the Bottleneck



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Building Out Performance Analytics

Steps for Successful Performance Management



Source: NHS Institute UK

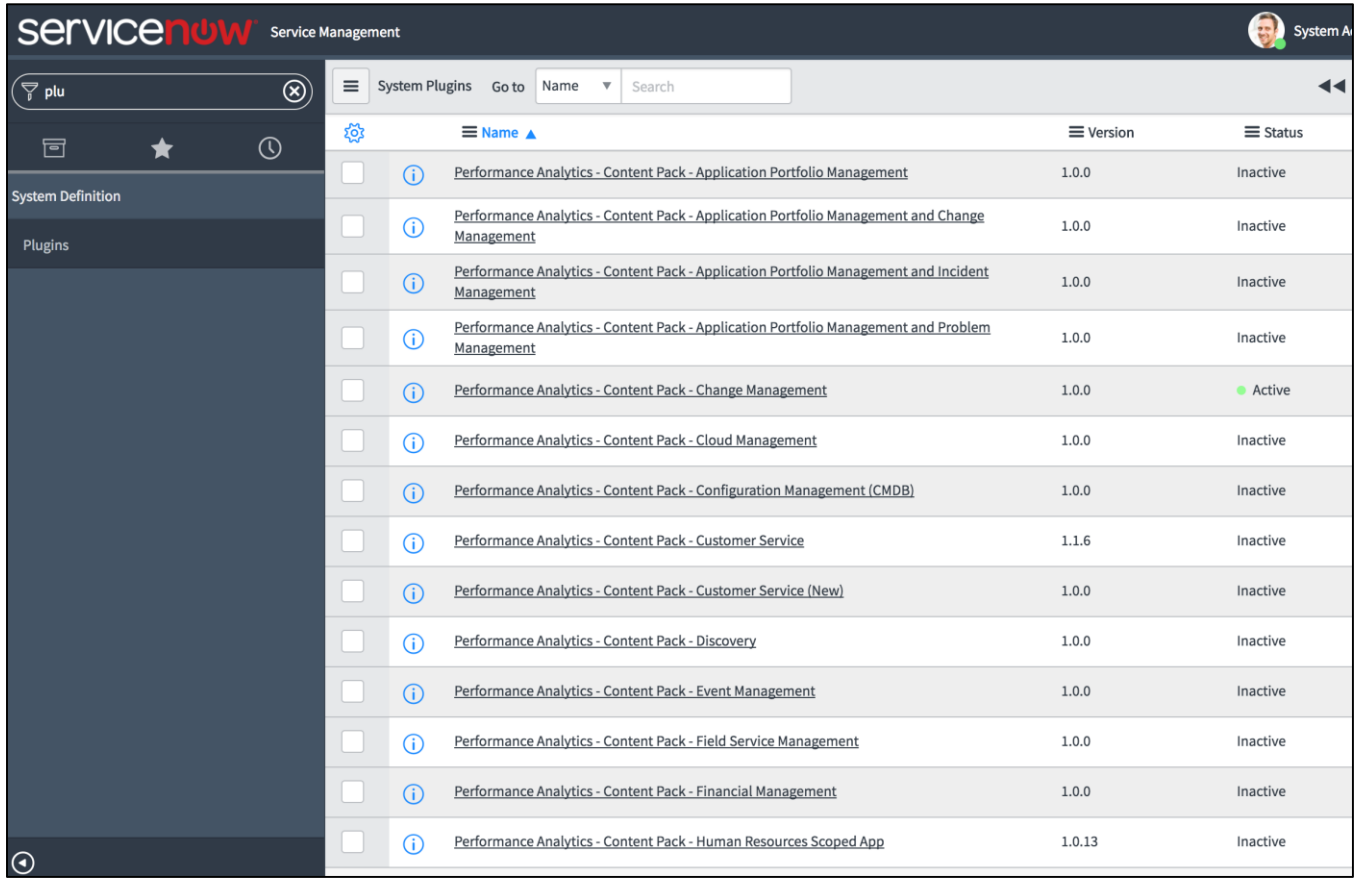
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Lab 1: Content Packs

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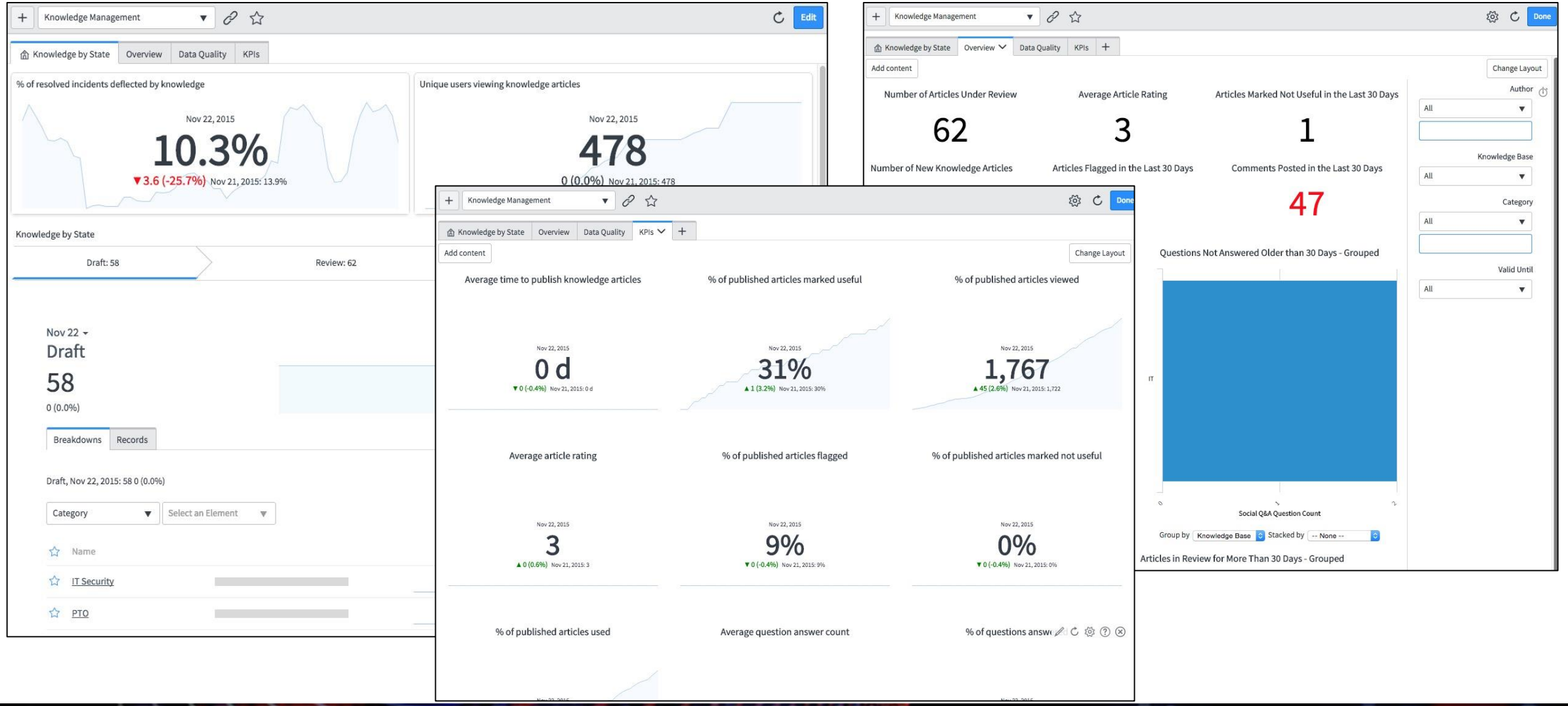
Lab 1: Activate a Content Pack

- **Lab Goal**: Get familiar with activating the content packs.
- Predefined content is available for most of the major modules of the platform.
- Provides indicators, breakdowns, collection schedule jobs, widgets, and dashboards. Everything you need to get started.
- This is best practice content aimed at getting you up and running as quickly as possible.



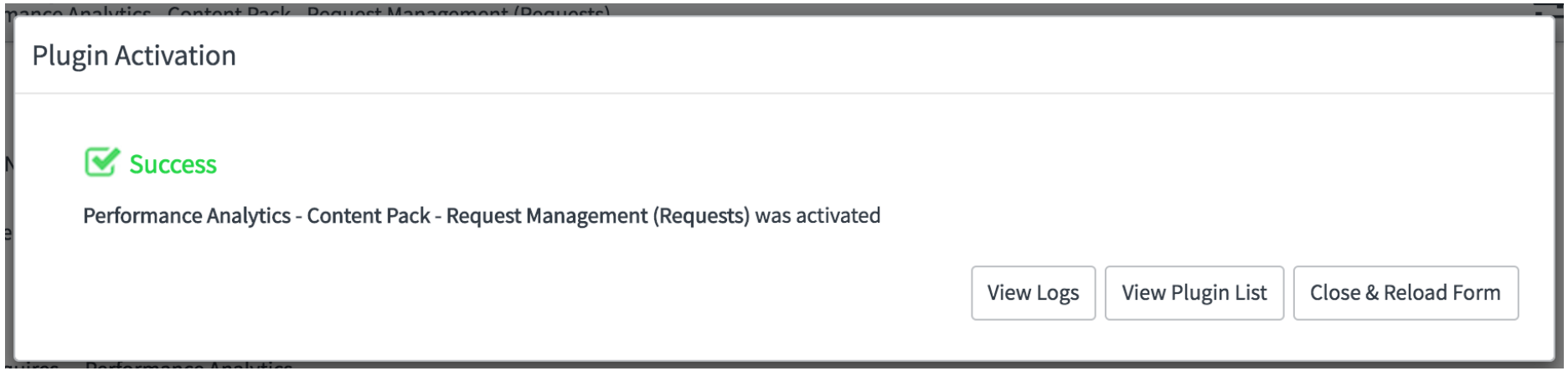
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What Gets Installed?



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Review Lab 1



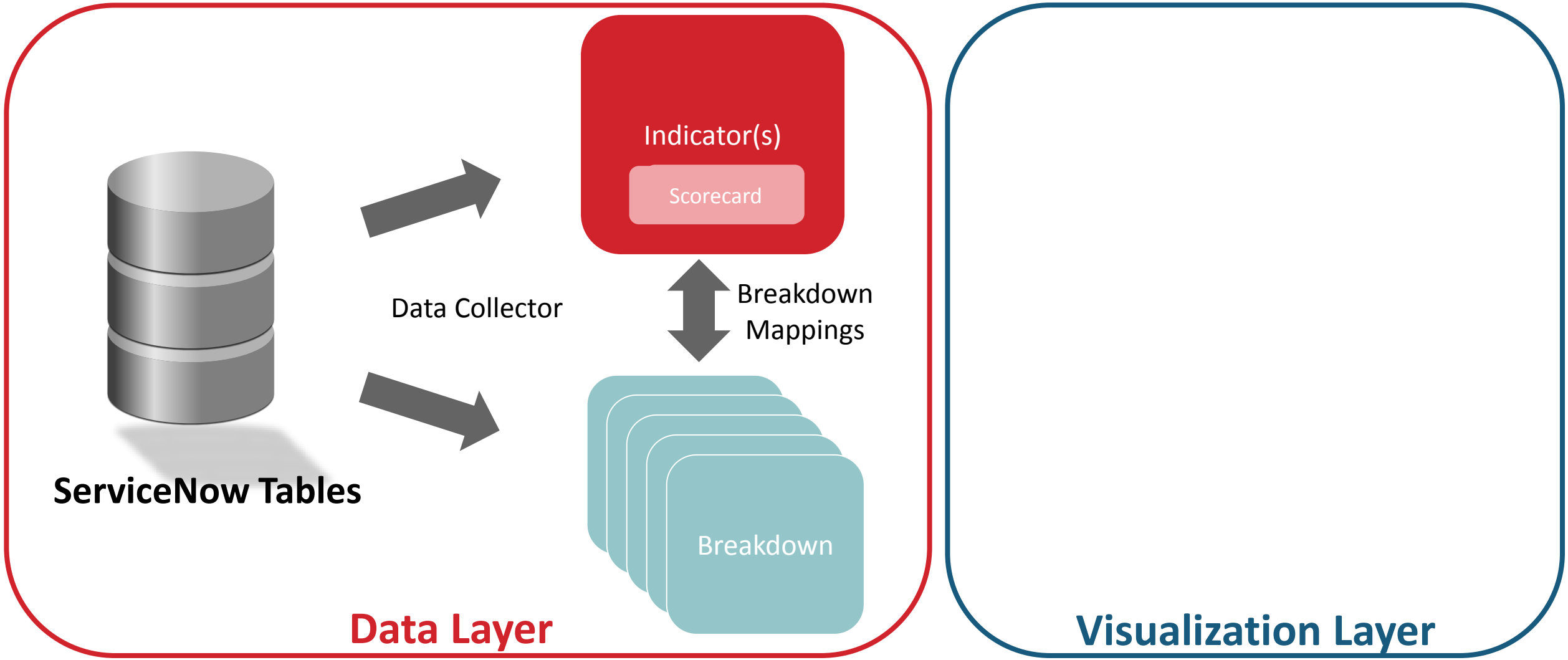
☐	ⓘ	Performance Analytics - Content Pack - Request Management (Requested Item)	1.0.0	Inactive	com.snc.pa.request
☐	ⓘ	Performance Analytics - Content Pack - Request Management (Requests)	1.0.0	Active	com.snc.pa.request2
☐	ⓘ	Performance Analytics - Content Pack - Service Desk Chat	1.0.0	Inactive	com.snc.pa.chat

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Lab 2: The Data Layer

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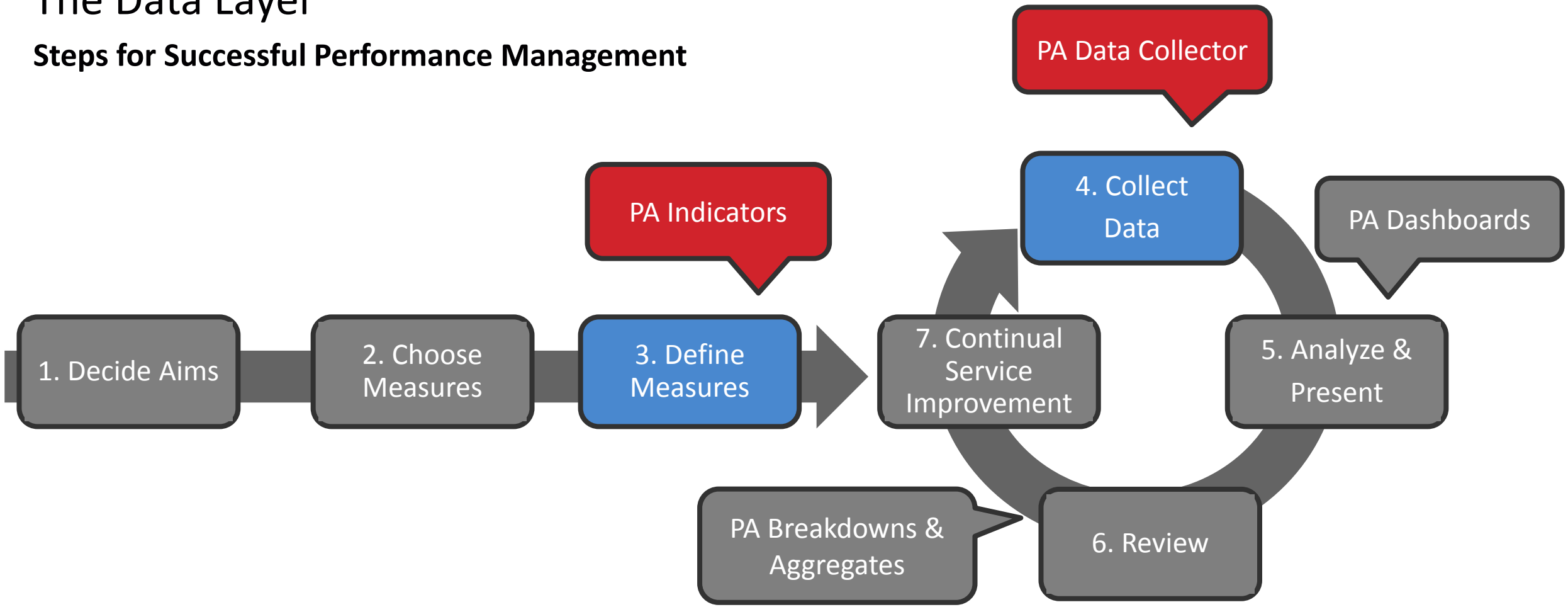
Performance Analytics Architecture



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The Data Layer

Steps for Successful Performance Management



Source: NHS Institute UK

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Lab 2.1: Running the Data Collection

- **Lab Goals:**
  - Understand data collections and the gathering of KPI scores
  - Practice gathering historical scores
  - Setup daily data collection jobs
- Performance Analytics captures a snapshot of KPIs for each period (day, week, etc.) collected
- Allows for retroactive score collection on many KPIs
- Best practice: KPI scores are collected and stored on a daily basis

Note: The historical collection jobs in this lab may take up to 10 minutes to complete. Please make sure the jobs are complete before moving to Lab 2.2.

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In-Platform Analytics

REAL-TIME

Make fast decisions with confidence.

Because your data stays in-platform at all times, it retains its **integrity**. Your scorecards and dashboards show to-the-minute information, empowering you to adapt at the speed of business.



NATIVE

Make smart, data-driven actions.

Out-of-the-box content precisely tuned to and optimized for ServiceNow workflows; best-practice metrics developed in tandem with application teams; designed for teams to communicate and collaborate.



SECURE

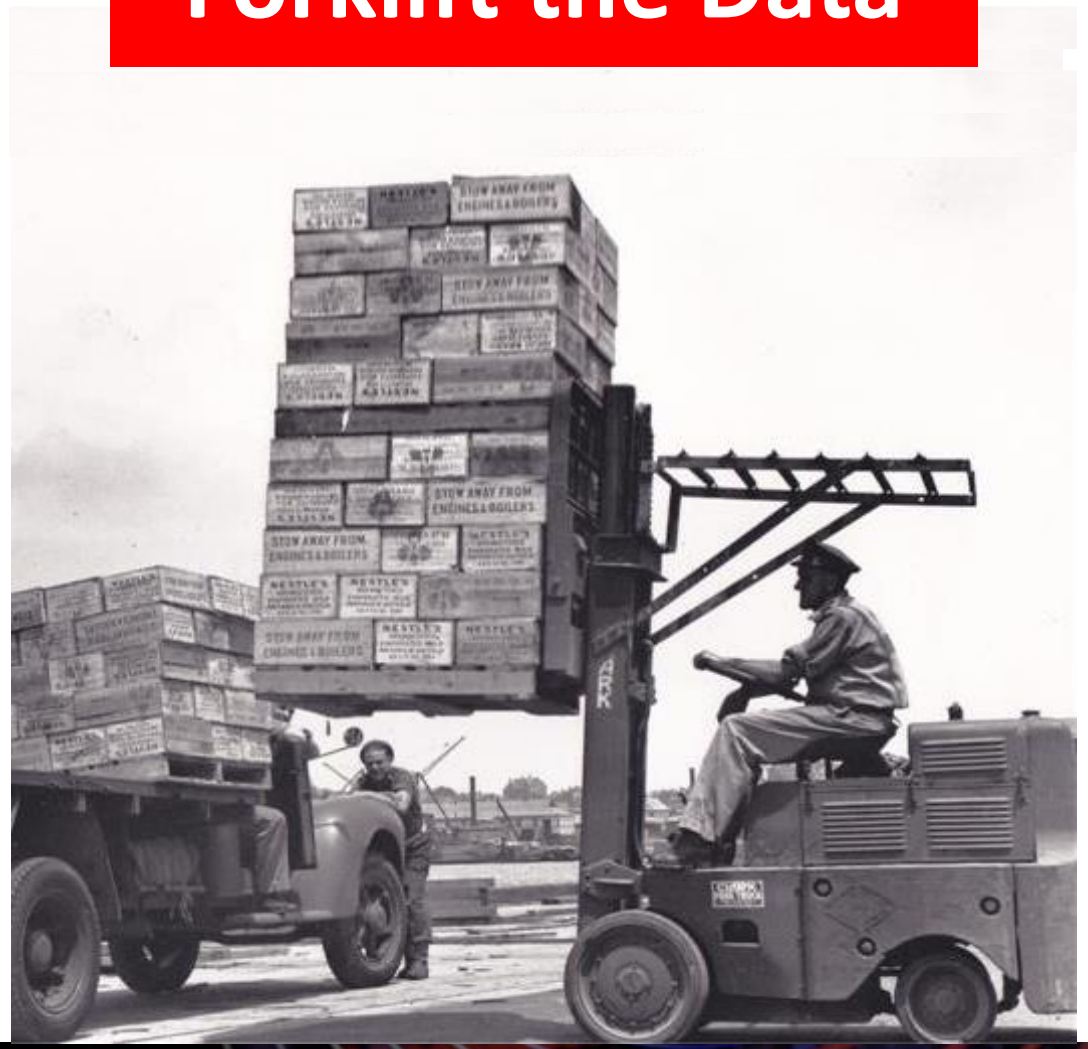
Reduce cost and risk.

No data is duplicated or leaves the secure ServiceNow enterprise cloud. Data is protected at all times by the same access control lists you implement across the platform.

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Traditional BI

Forklift the Data



Performance Analytics

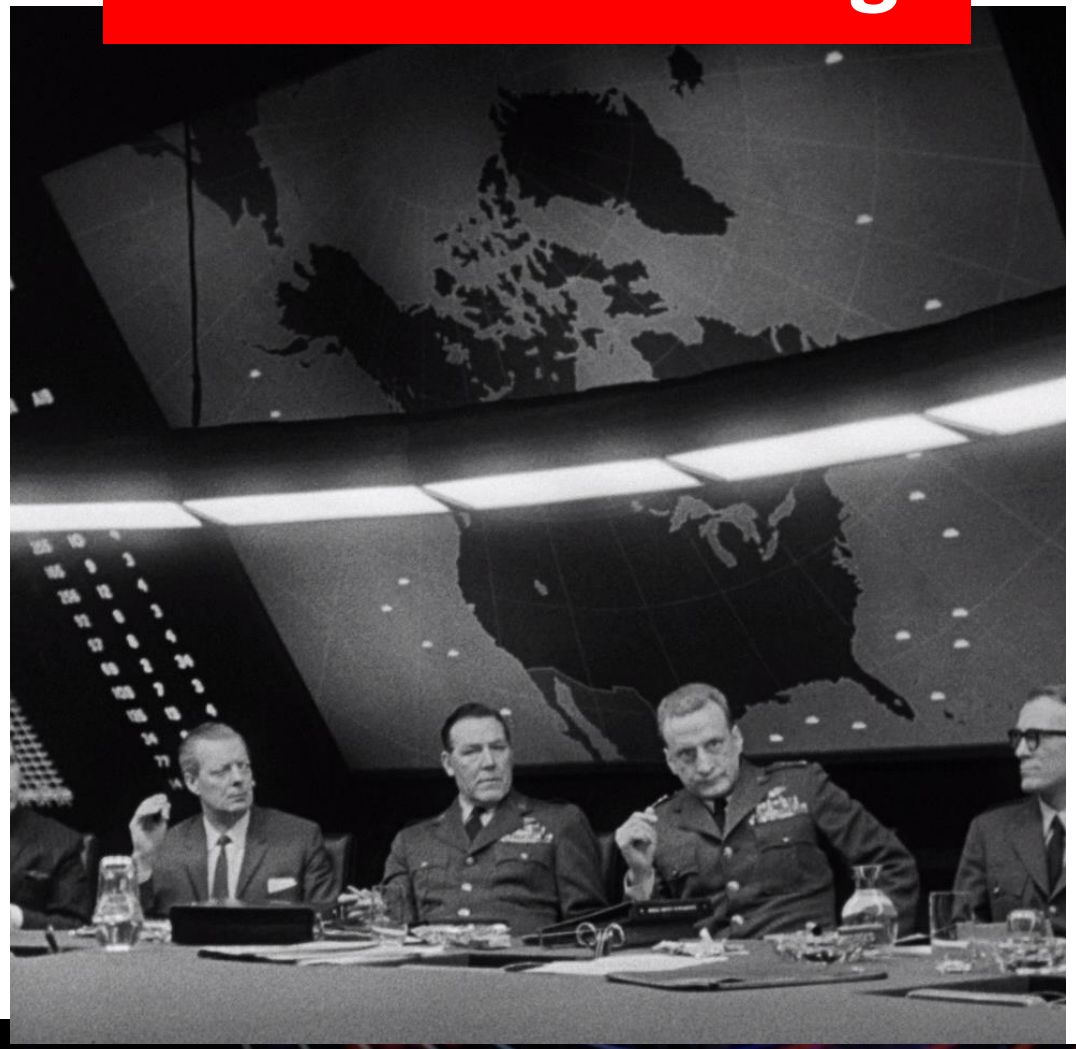
In-Platform



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Traditional BI

Central Planning



Performance Analytics

Empower People



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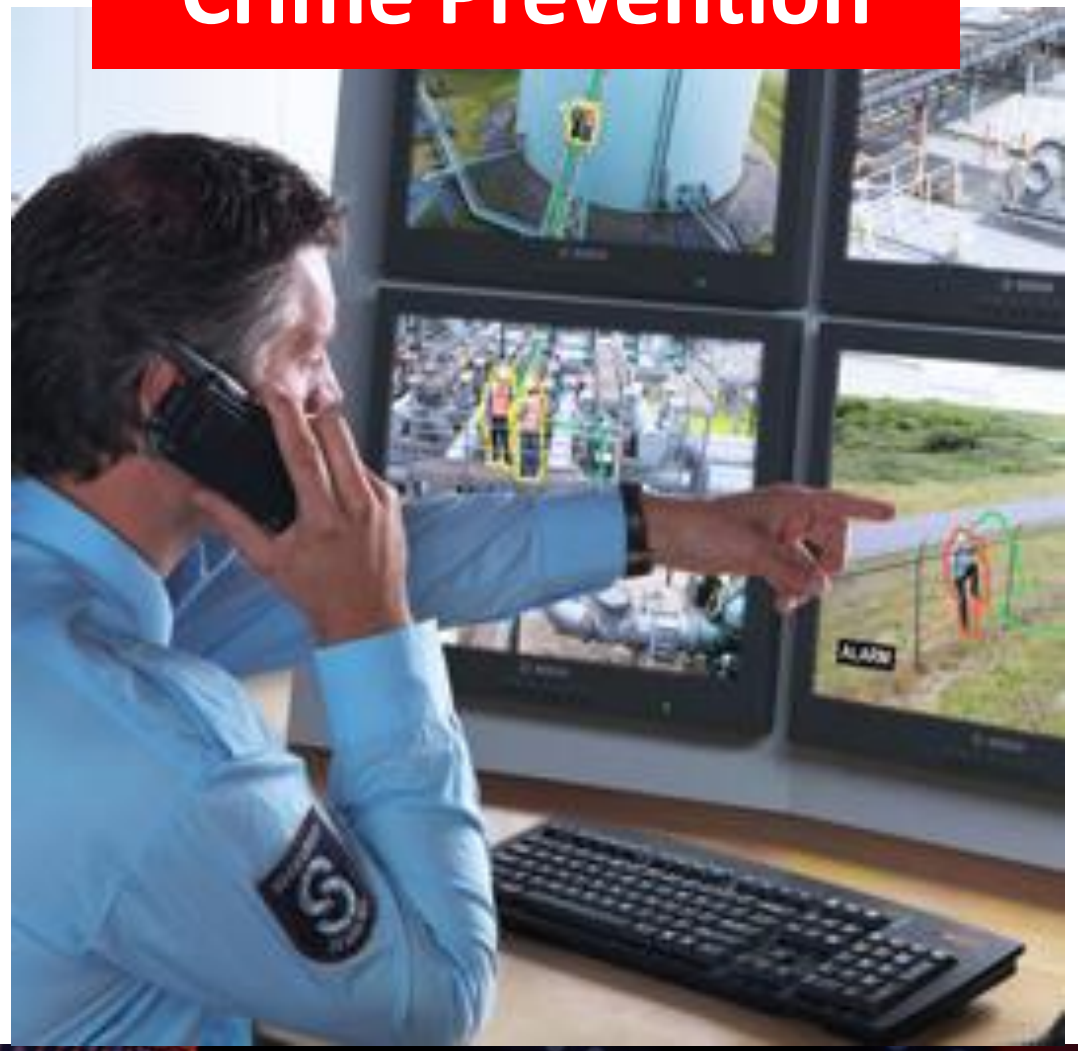
Traditional BI

Crime Investigation



Performance Analytics

Crime Prevention



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Measure: “Leading” vs. “Lagging” Indicators

LEADING INDICATOR
(Input-oriented)

- ✓ Hard to measure
- ✓ Easy to influence
- ✓ Prospective

LAGGING INDICATOR
(Output-oriented)

- ✓ Easy to measure
- ✓ Hard to influence
- ✓ Retrospective

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Lagging indicators

"Certainly we want good results, but management by results is not the way to get good results…work on the causes of results"

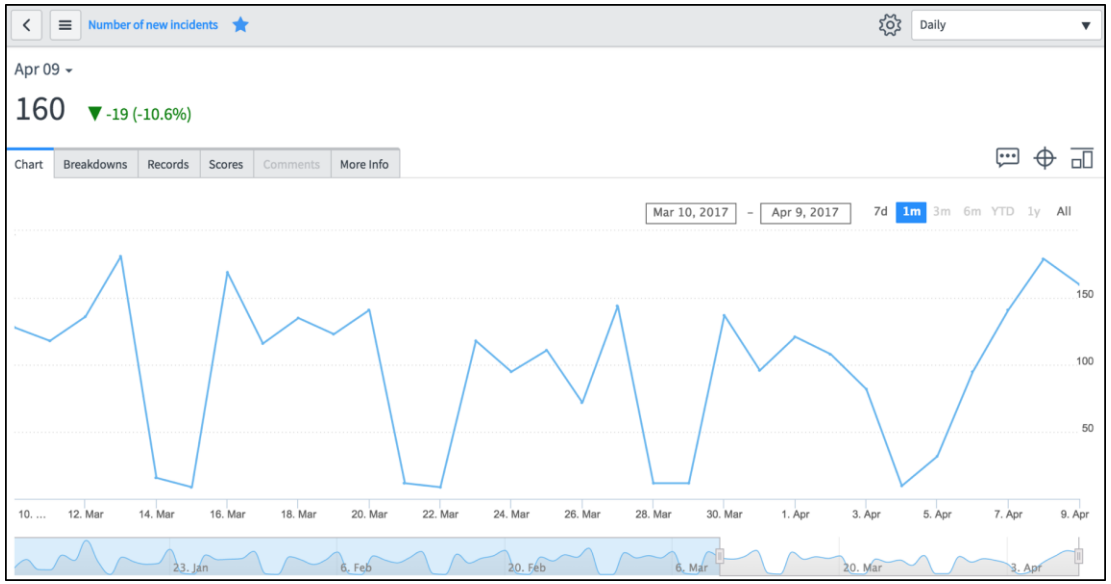
W. Edwards Deming

Leading indicators

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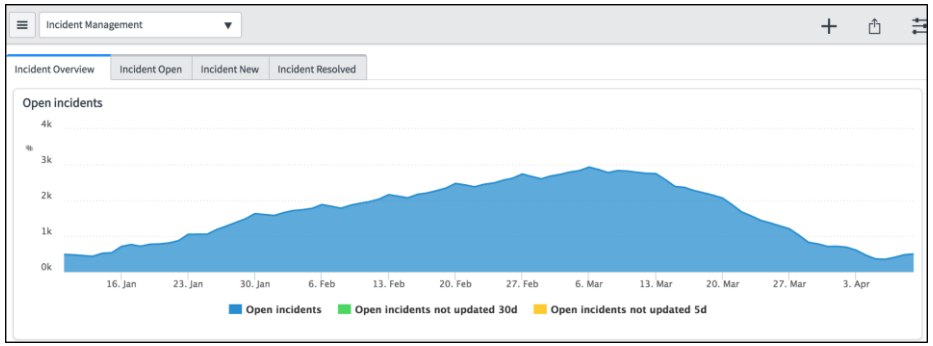
Lab 2.2: Indicator Scorecards

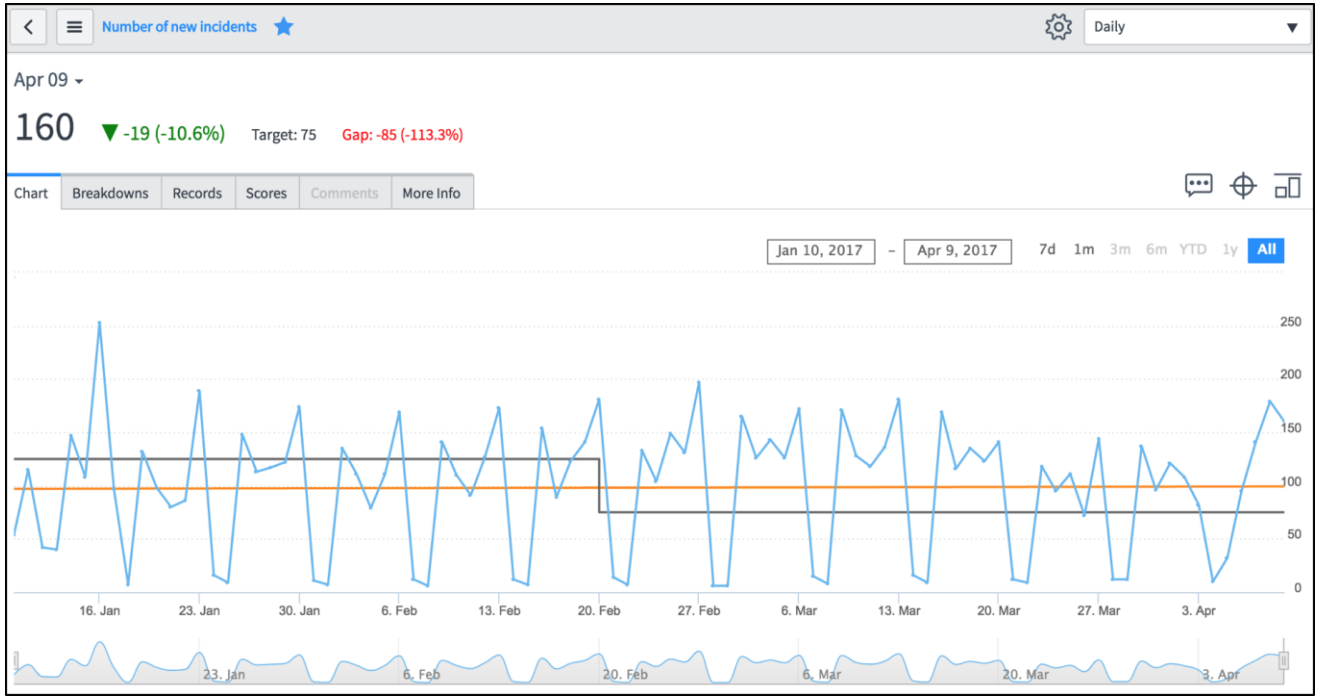
- **Lab Goal:** Understand how to navigate the detailed scorecard view of a KPI
- Scorecards are a view of the KPI data in a consumable format
- Scorecards allow us to make sense of data
- Use Scorecards to analyze data
  - Aggregates
  - Breakdowns
  - Targets



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Review Lab 2



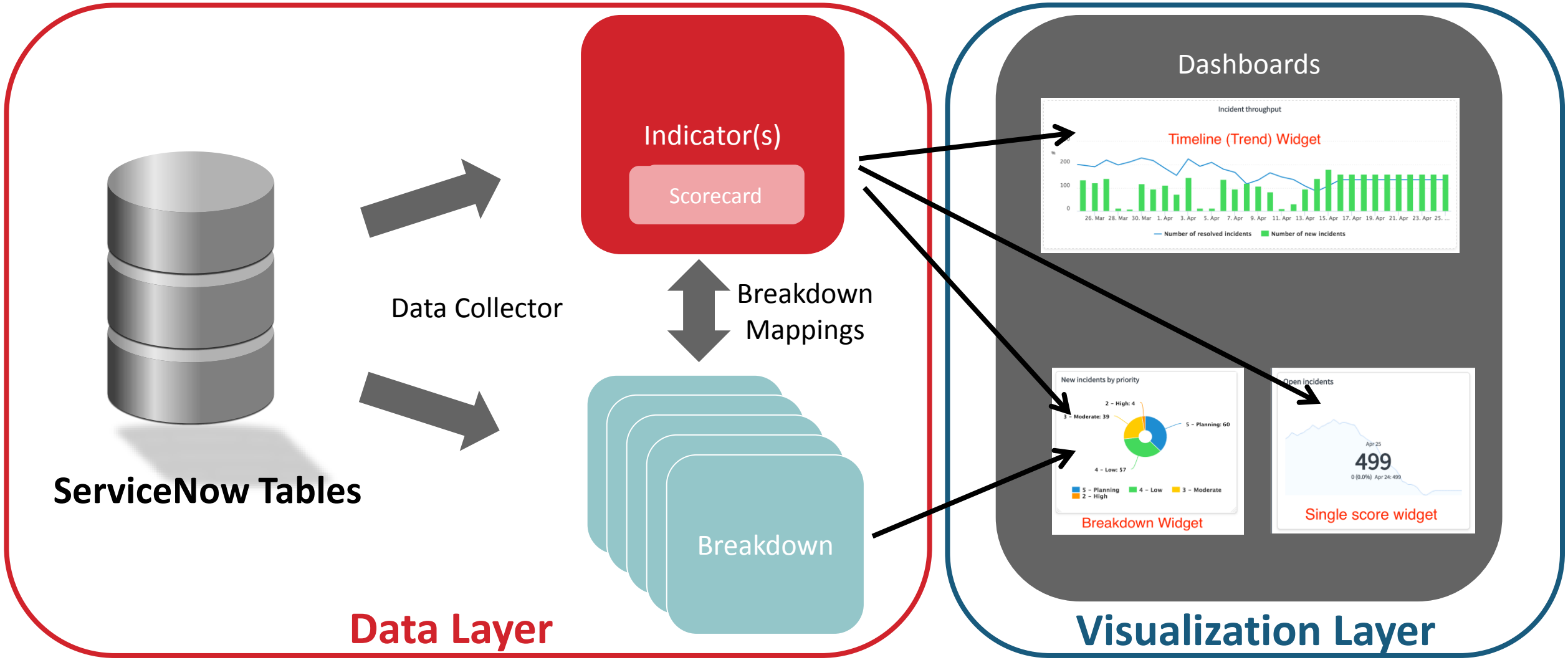


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Lab 3: The Visualization Layer

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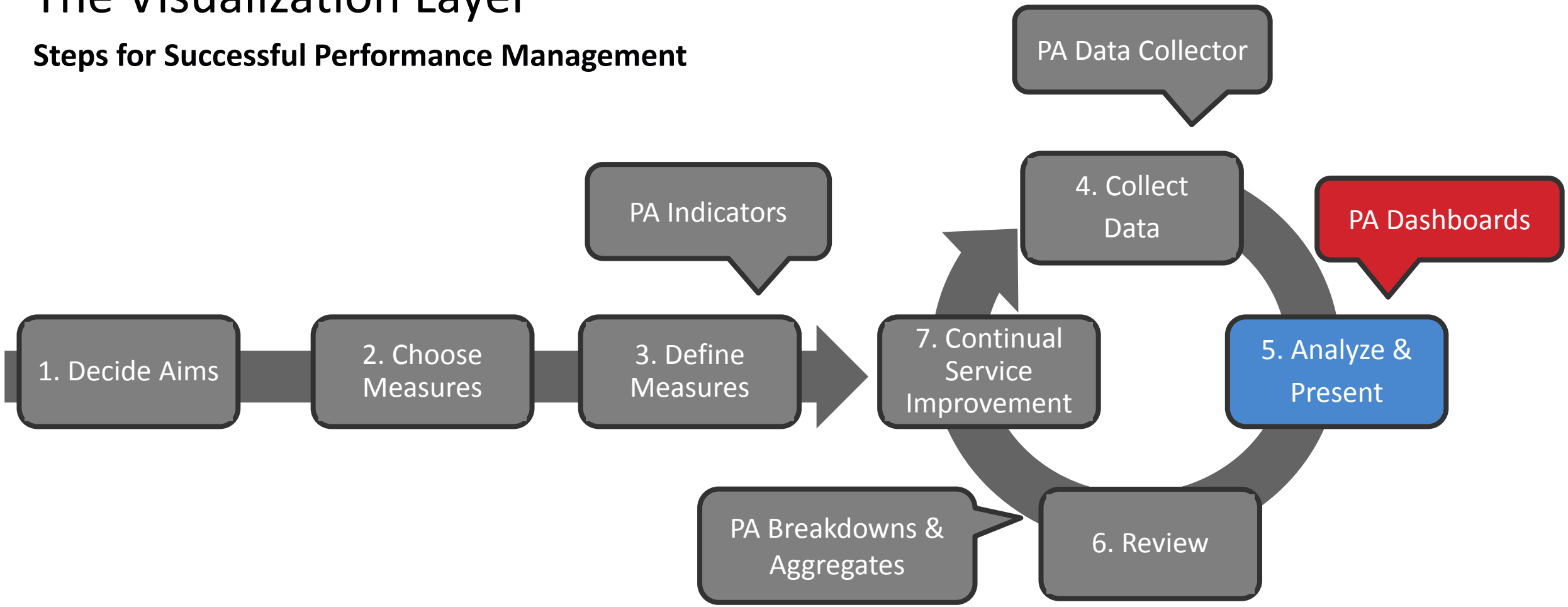
Performance Analytics Architecture



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The Visualization Layer

Steps for Successful Performance Management



Source: NHS Institute UK

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Lab 3.1: Dashboards and Widgets

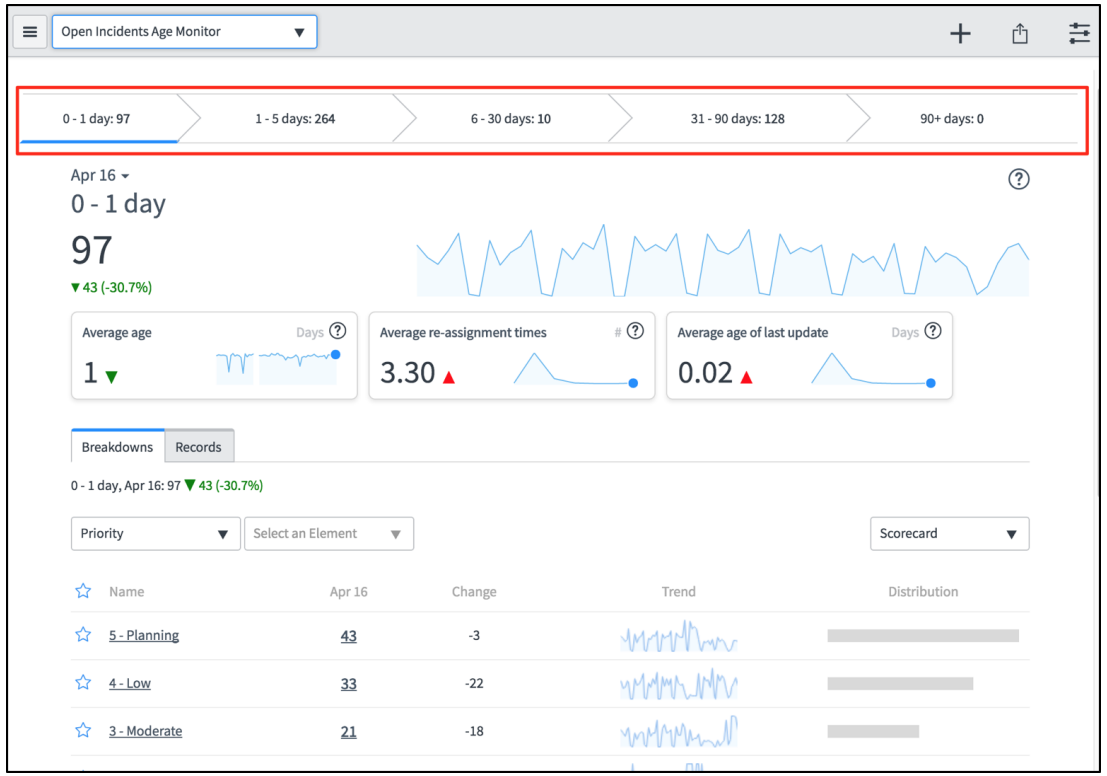
- **Lab Goal**: Create a dashboard and use widgets to visualize data on a dashboard
- While scorecards provide a detailed way to analyze data, dashboards provide a visual summary of the data
- Dashboards tell the story found in the KPI data
- Widgets are the means of displaying indicator data
- A widget may contain one or more indicators

Note: The description on the top of Page 29 should say you are working with the Incident process (Not Problem and Change)

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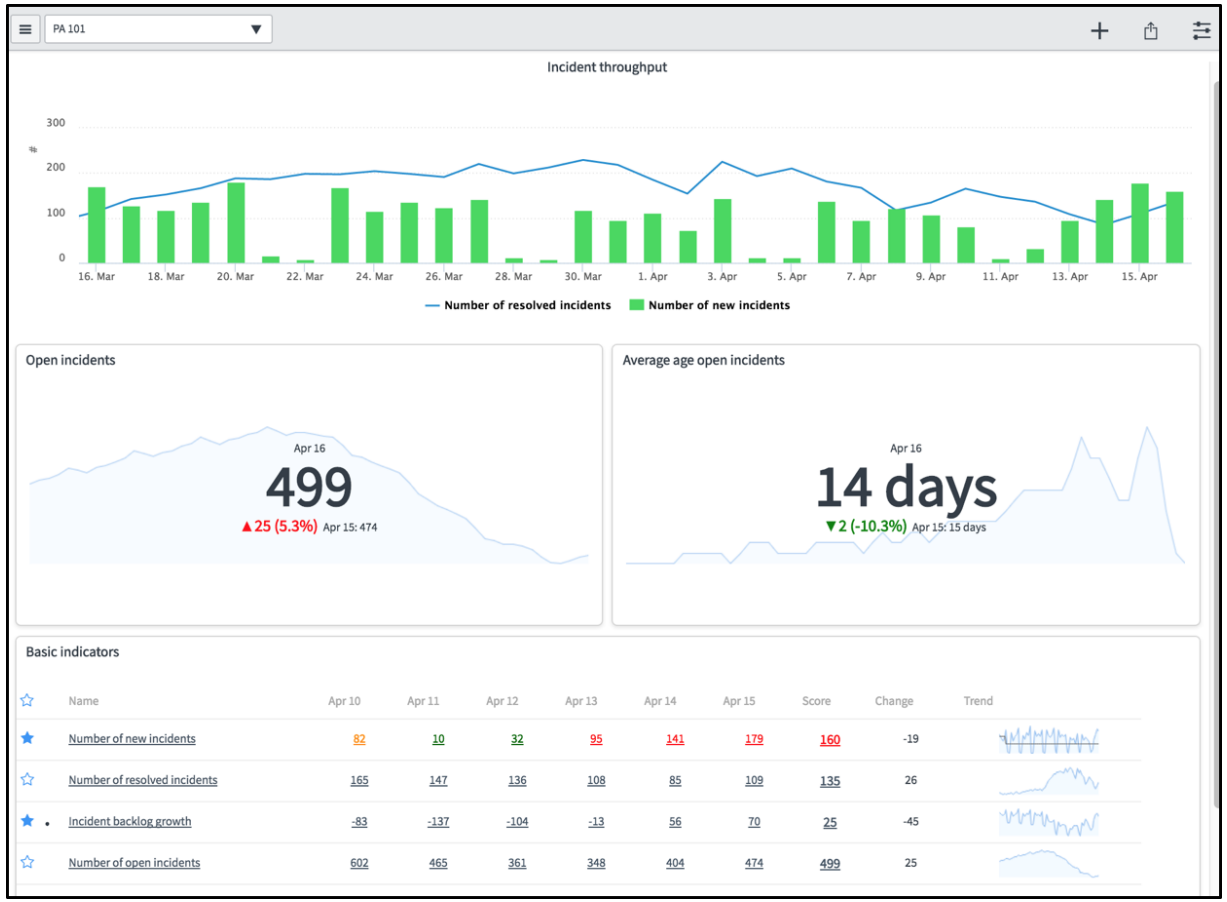
Lab 3.2: The Workbench Widget

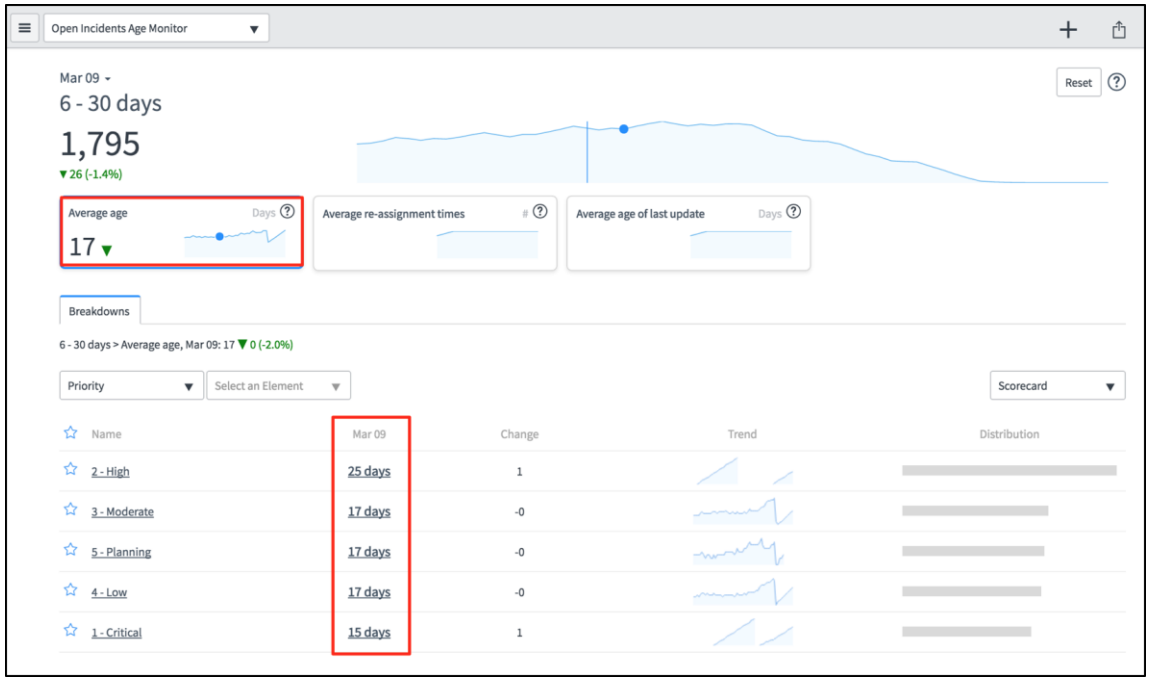
- **Lab Goal**: Explore how a workbench widget can be used for deeper process analysis
- Workbench widgets provide visualizations of multiple levels of breakdowns within an indicator
- Allows for rich analysis within a single dashboard view



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Review Lab 3





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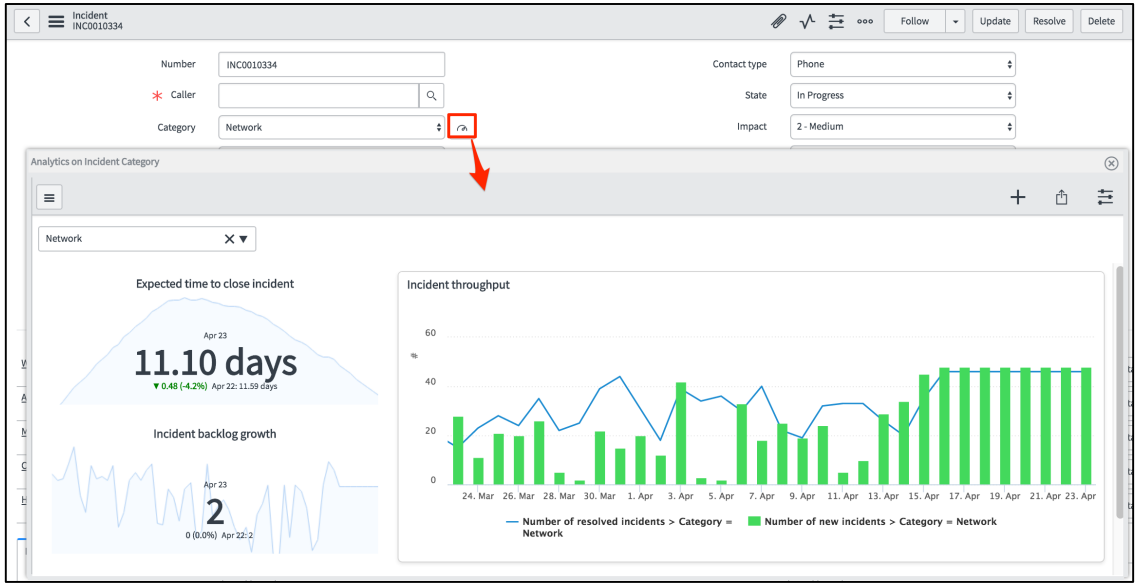
Lab 4: In-Form Analytics

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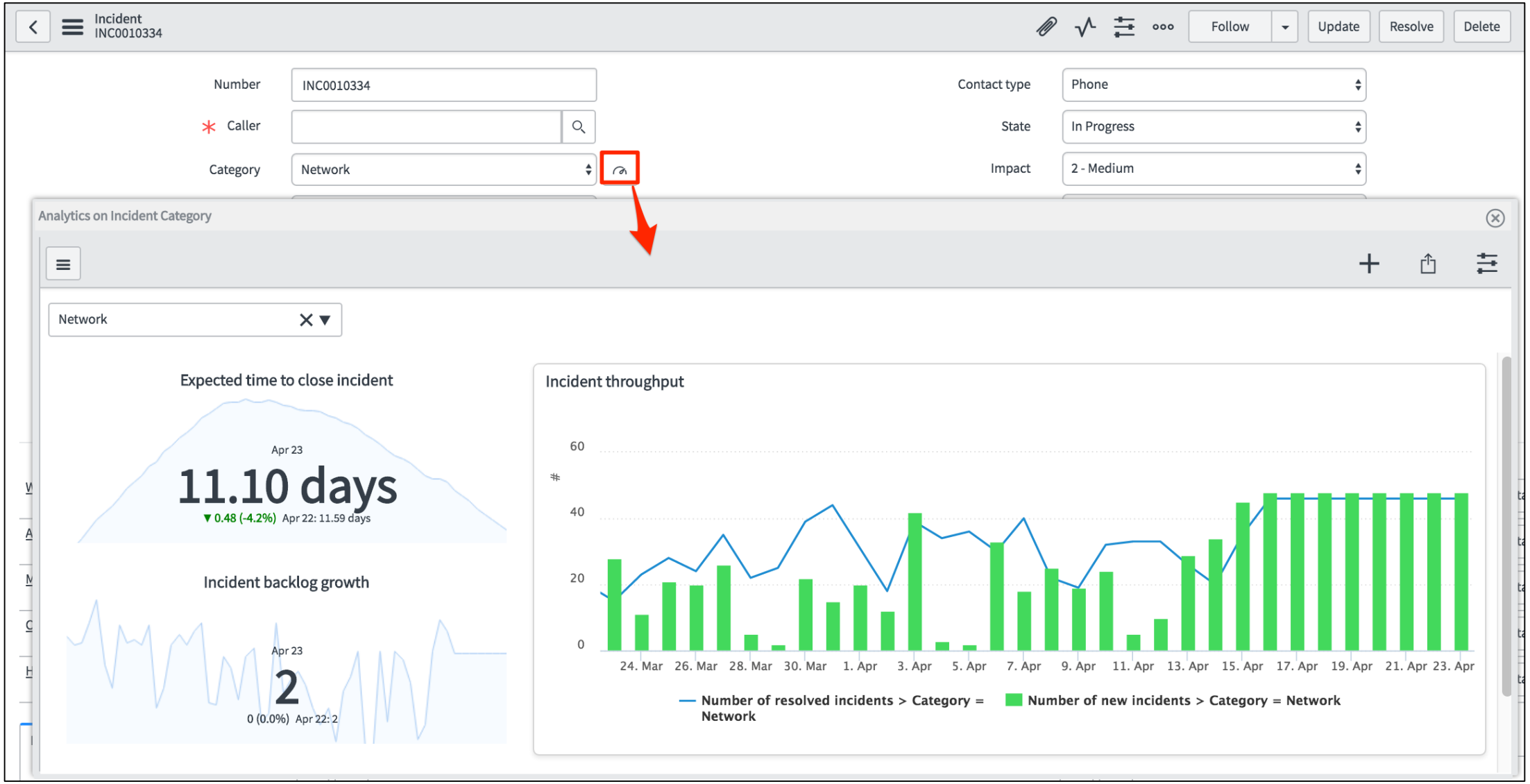
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Lab 4.1: Working with In-Form Analytics

- **Lab Goal:** Learn how to use and configure in-form analytics dashboards
- In-form analytics puts dashboard analytical capabilities into the hands of fulfillers
- A context-specific dashboard may be viewed while working in a task-based form

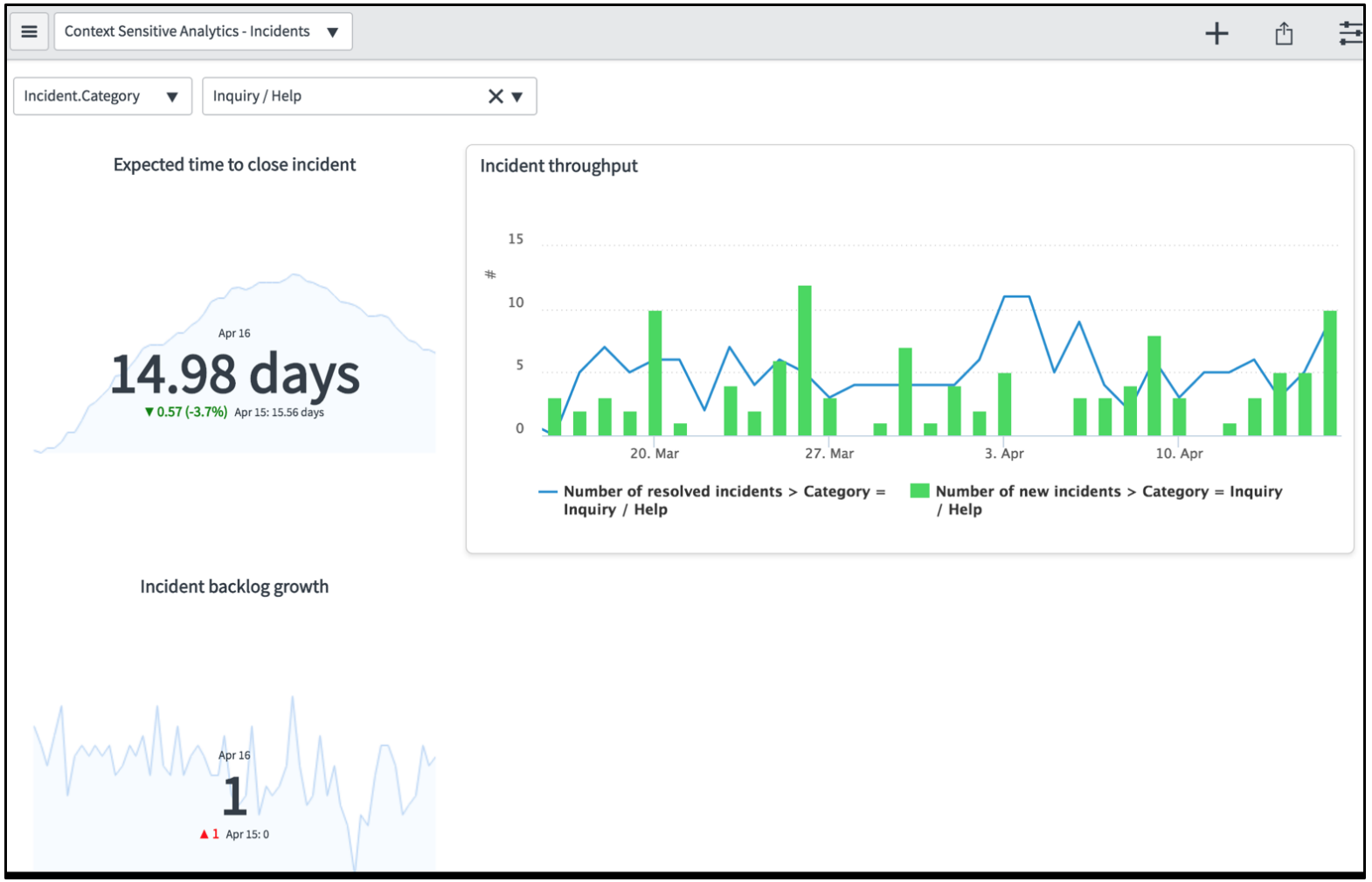


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Review Lab 4



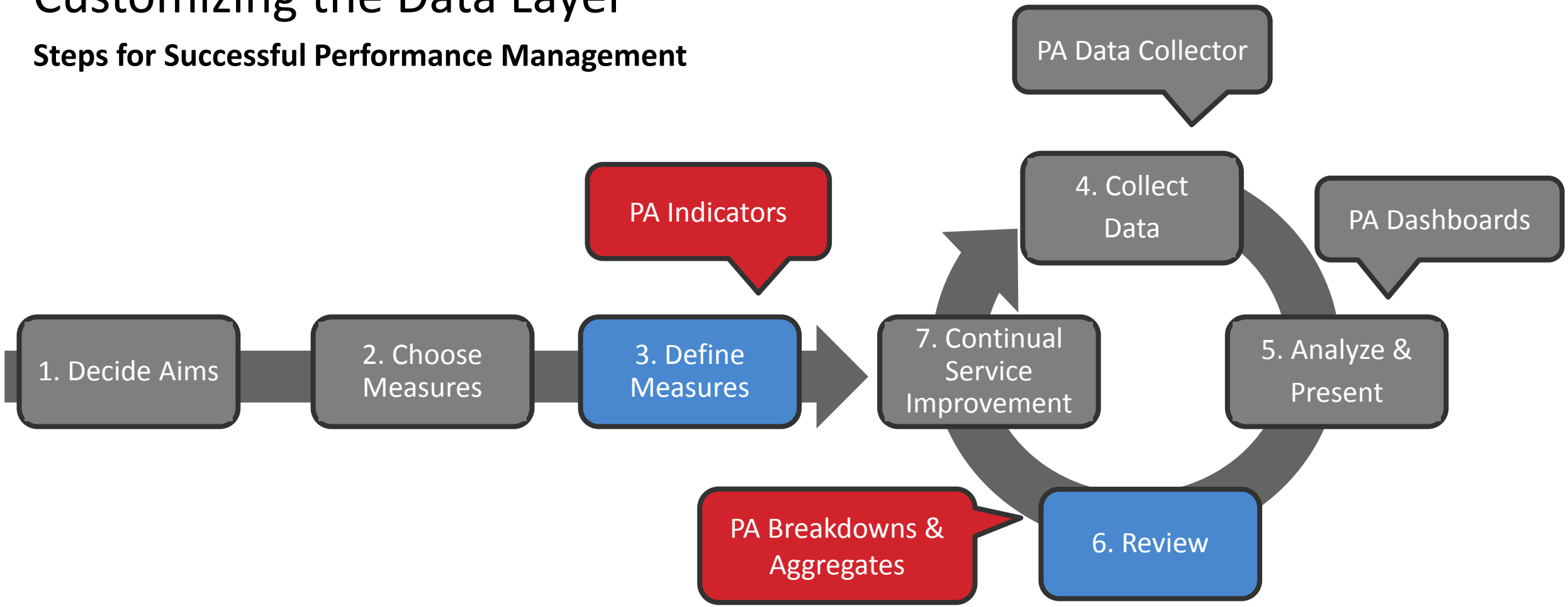
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Lab 5: Customizing the Data Layer

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Customizing the Data Layer

Steps for Successful Performance Management



Source: NHS Institute UK

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Lab 5.1: Automated Indicators

Starting from Scratch

- **Lab Goal**: To create a new indicator from scratch, including breakdowns & visualizations.
- **Aim (1):** Reduce costs, Improve resolution time, Increase customer satisfaction etc.
- **How? (2)**: Drive higher resolution rates of Incidents by the first handler.
- **Why?** Less staff required in resolution process means lower costs to your organization, is likely faster, and helps make the customer happier.
- **How to define this measure? (3)**
  - Assignment Group = Service Desk (Initial handling team)
  - Reassignment Count = 0 (It was not handed off to someone else)
  - Resolved Duration < 3 days



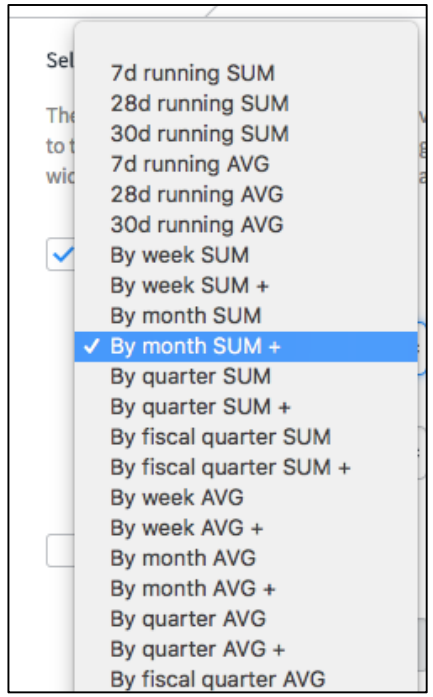
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Lab 5.2: Formula Indicators

Leverage Existing Data for New Calculated Results

- **Lab Goal**: Create a new Formula indicator to extend the previously created indicator.
- Formula Indicators are very useful for % calculations or where some kind of logical calculation needs to be applied.

- **Note**: When you select a time series with a "**+**" at the end, it will display the current month's cumulative score also. The one without the "**+**" will exclude any incomplete time periods.



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Lab 5.3: Automated Breakdowns

- **Lab Goal**: Create your own automated Breakdown

- Automated breakdowns will automatically use any new/updated values that you make to your base data set.
- Breakdowns add additional dimensions of analysis to the data. Remember that not all dimensions will be suitable in every situation and across every indicator. Breakdown mappings, relations and the Breakdown Matrix can help you be specific about this.

- **Note**: Always remember to rerun the data collection after you add or modify any breakdowns to allow the system to recalculate the data according to your new definitions. The time ranges that you want the new breakdown to take effect across are also important.

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Top Takeaways

1

Understand Performance Analytics use cases

2

Collect and present analytics scores in scorecards and dashboards

3

Extend Performance Analytics by creating new indicators and breakdowns

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Thank You

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Q & A

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