ServiceNow Education for SDCOE Employees Project: Final Presentation

Prepared by the Project Team

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Why did we do this project?

To educate SDCOE employees on how and why to use ServiceNow to maximize the use of the system. This will lead to an improved customer service experience and a more efficient process for our ITS agents.

Project Goals:

☑ Create a new job aid and instructional video that are clear, concise, and easy to use

☑ All SDCOE employees – and especially Executive Assistants, Administrative Assistants, Program Secretaries, and others in a support role – will know the expected procedure for requesting tech support

☑ New employees will have exposure to ServiceNow at orientation/onboarding

Desired outcomes:

- More SDCOE employees will know how to access ServiceNow and correctly enter a ticket (when they need to)

- There will be a decrease in the number of emails, phone calls, chats, and walk-ins asking for assistance from CSS

SDCOE BOARD GOAL 4

- **Board Goal 4:** Maximize human and operational resources to strengthen the organizational culture of SDCOE

ITS GOALS 1 & 3

- **ITS Goal 1 – Maximize Customer Success:** Supply superior, trusted service through customer focused solution & positive relationship. Become the partner of choice for technical and creative services

- **ITS Goal 3 – Improve Division Efficiencies:** Implement next generation processes and automation, design purpose-driven solutions, enable collaboration & build staff capacity

Who was involved in this project?

Core Project Team

- Peyri Herrera, Flora Pourzamani, Candace Wong
- Tyler Petro

Steered by...

- ITS Senior Leadership

Other Key Players

- 16 Admin Assistants *– provided initial feedback*
- Uyen Quach, Eduardo Paredes, and John Vaillancourt *– helped with ServiceNow*
- CSS Team *– tracked baseline metrics and provided input*
- Stacy Brandt *– assisted with Communications*
- Susana Tsutsumi *– helped post files on Common Ground*

Our Stakeholders

- Executive Assistants, Admin Assistants, and others in a support role
- Managers
- New Hires
- All SDCOE Employees

Project Deliverables: Training Materials

Job aid posted on *Common Ground*

Training video posted on *Common Ground*

Project Deliverables: Communications
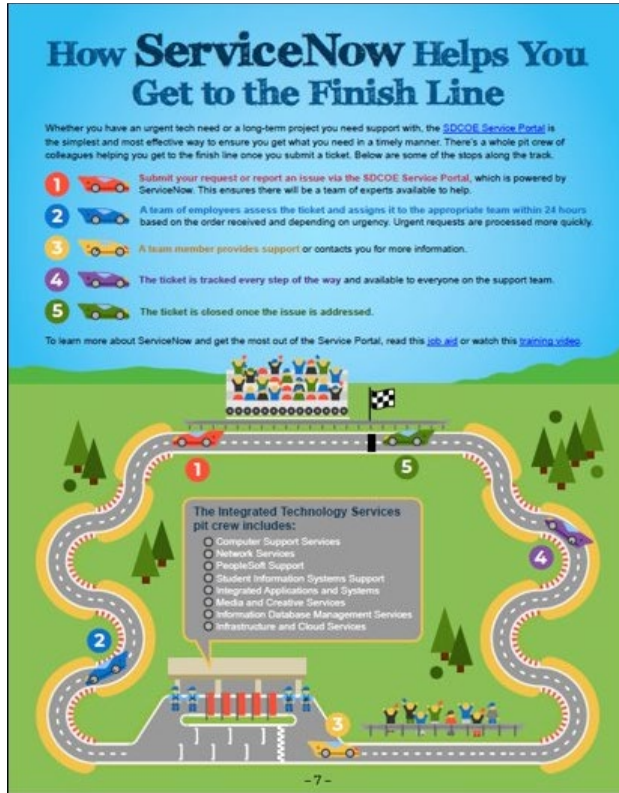
Profile in May issue of *Inspire*
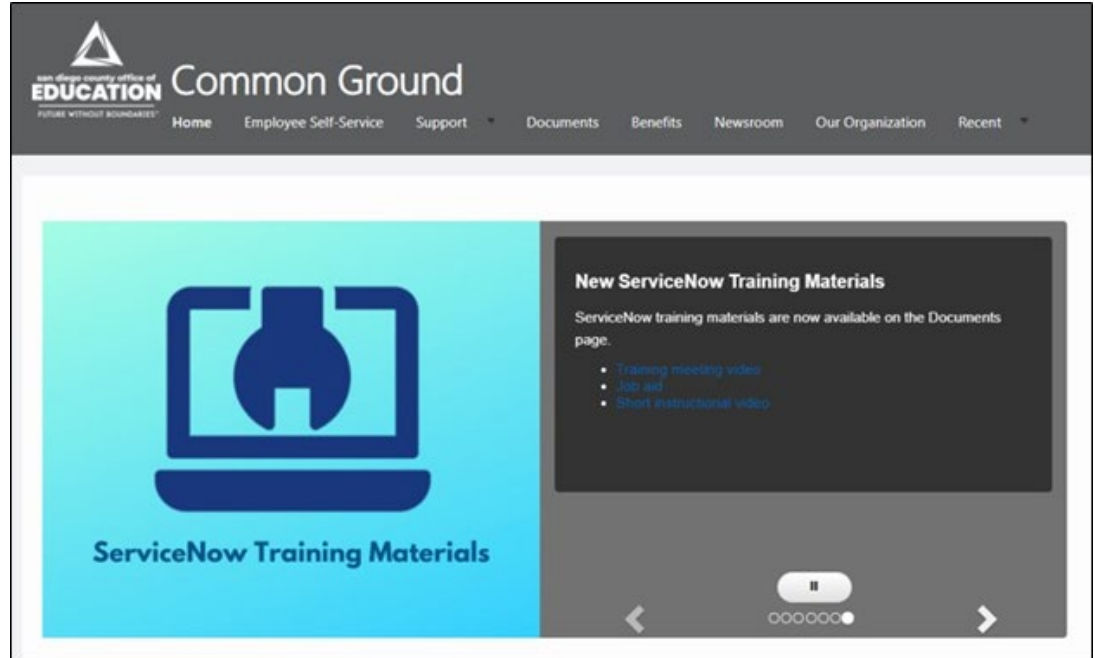
Banner ad published on *Common Ground*

Other Deliverables

- **RECORDED TRAINING MEETING:** 48-minute training meeting with Administrative Assistants and others, posted on Common Ground

- **SCRIPT:** CSS created a "friendly script" to use when an employee contacts them directly

- **CHANGES TO SERVICENOW:**
  - **Complete!** Updated text/descriptions on home page upon logging in
  - **Complete!** Updated login experience
  - **Complete!** Ability to submit an INC on behalf of someone else

Stakeholder Survey

- We asked the meeting attendees: "How did we do?"

- 33 responded (out of 61 meeting attendees) – *54% response rate*

About Our Survey

- **Survey Timeframe**: Tuesday, May 4 - Thursday, May 6, 2021 at 5 pm
  – *launched 2 weeks after the meeting*

- **Audience:** Intended for anyone who attended the meeting on April 20 or watched the recorded version

- **Total:** 33 respondents (out of 61 attendees, or 54% response rate)

Q1.
Which division are you in?

Q2. How did you attend?

- **94%** attended the Teams meeting (31 out of 33)

- **6%** watched the recorded video of the training (2 out of 33)

Total: 33 respondents

- Admin (2) 6%
- Business Services (4) 12%
- Human Resource Services (4) 12%
- Integrated Technology Services (4) 12%
- Learning and Leadership Services (8) 24%
- Student Services and Programs (11) 34%
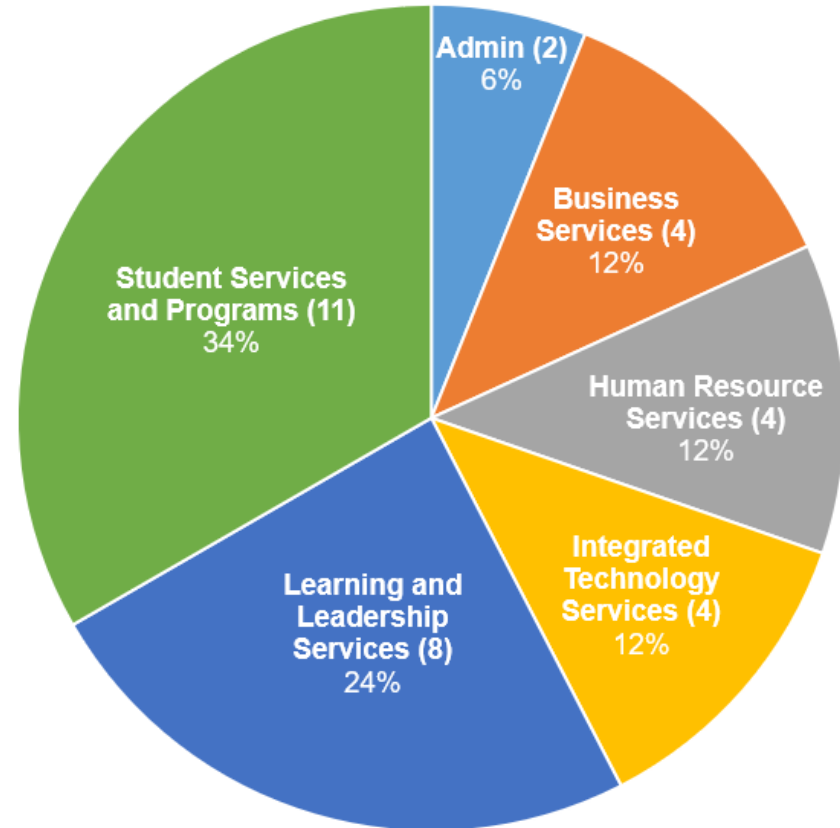
Q3.
How many people do you submit Service Now tickets for?

Total: 33 respondents

Most of the respondents support *other staff*.

Chart values:
- 1 – Just me: 6.1%
- 2-4 people: 42.4%
- 5-10 people: 24.2%
- 11-30 people: 24.2%
- 31+ people: 3.0%
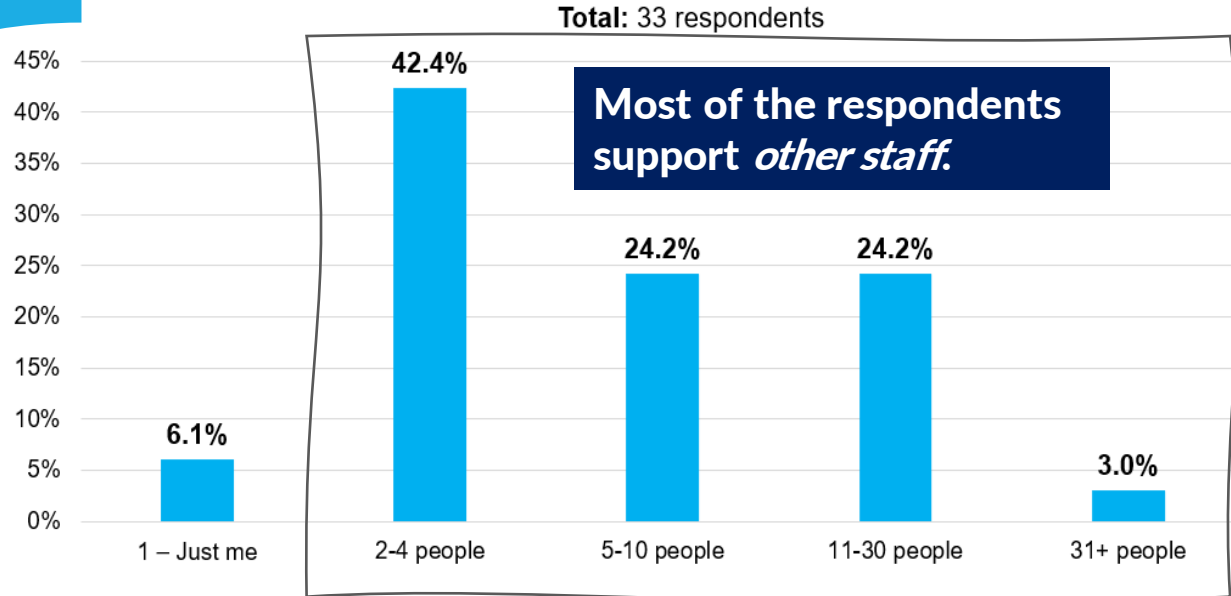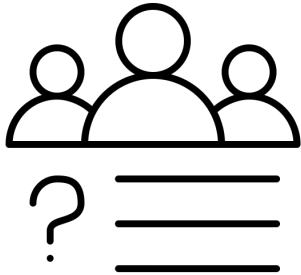
Q4.
What 2 adjectives would you use to describe the training meeting?

Q5.
In what ways did the meeting help you?
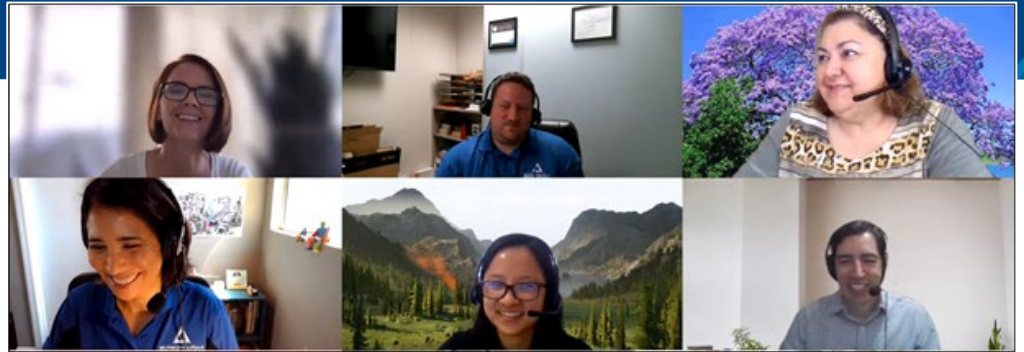
	TRUE I learned something new!	FALSE I already knew everything presented	N/A This doesn't apply to me
I am better equipped to help the people I support.	**85%**	12%	3%
I have clarity on how to submit a ticket, including how to differentiate a Request from an Issue.	**76%**	24%	--
I now know the expected procedure for requesting tech support using ServiceNow (and to not directly contact a Help Desk team member).	**73%**	27%	--

Q6.
What did you take away from the session?
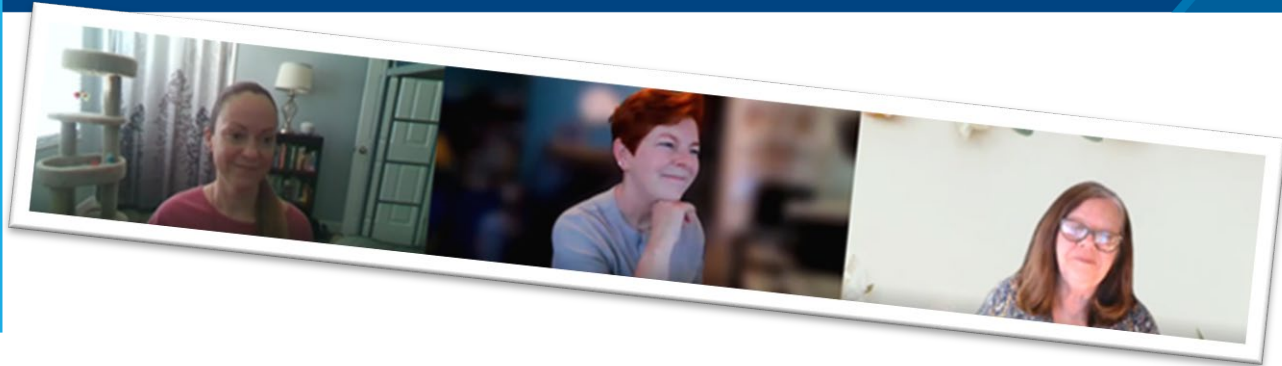
Process

- That all employees have access and can click on SDCOE Staff login vs entering username/password
- I learned you should NOT call the helpdesk. I know many of my managers thought calling the helpdesk was the first step.
- Understanding the current process for support... Thank you!

Better Use of the System

- That I was able to show my team how simple it is to submit a ticket so if I was not around to do so they also know how to submit it
- I learned that I can update a work order already in progress
- I better understand that categories determine the initial routing of requests

Search

- I found it helpful that the search functionality was explained in detail
- I learned how to use keywords in the search feature
- How to use keywords in the search bar to have better results
- I also learned about the search function. I had never used that before. It was helpful to see that demo.

Q6. What did you take away from the session? ALL RESPONSES, BY DIVISION

Administration

- I better understand that categories determine the initial routing of requests (such as PeopleSoft), and then Tyler reviews others and routes appropriately.
- I learned that I was not the only one who felt the list of reasons for submitting a ticket was confusing and needed to be streamlined.

Business Services

- Appointments are available with the Tech Support
- It was good to hear other admins' questions and clarity on some of the admin functions we are asked to do (ex: all the tech tickets for new hires/when someone leaves for things like Teams phone #, Google)
- that all employees have access and can click on SDCOE Staff login vs entering username/password.

Human Resource Services

- I found it helpful that the search functionality was explained in detail.

Integrated Technology Services

- ALL SN tickets go through Tyler?
- How to use keywords tin the search bar to have better results.
- I was already familiar with this information.

Learning and Leadership Services

- I did already know the information however I know many people who do not or are not patient enough to look for themselves and I am not always around to put in a ticket for them. It helps to have this video to send them and in New Hire info.
- I learned how to use keywords in the search feature.
- I learned you should NOT call the helpdesk. I know many of my managers thought calling the helpdesk was the first step. I also learned about the search function. I had never used that before. It was helpful to see that demo.

Student Services and Programs

- A lot of people have the same questions I have.
- I learned that I can update a work order already in progress and that if it is urgent, (like full internet shut out) I can call Tyler.
- My specific takeaway was that I was able to show my team how simple it is to submit a ticket so if I was not around to do so they also know how to submit it.
- Understanding the current process for support…Thank you!

Q7.
Please give us feedback on the new materials we created.

Q8. Have you shared the new materials with others?

- I shared with *193 employees*.
- I shared them with *my department - 25 people*. I encouraged them to watch the video and stressed the importance of not calling the helpdesk.
- I shared with *all of the staff at Cuyamaca Outdoor School* and it was appreciated.
- I shared it with *my entire team (9 team members)*. They were grateful and happy to know that there is easier now to submit tickets.
- Shared with *5 people*. Realization that the employee with the IT problem should submit their own request.

	TOTAL AGREEMENT	STRONGLY AGREE (4)	AGREE (3)
The new 5-minute INSTRUCTIONAL VIDEO is clear, concise, and easy to follow	**100%**	73%	27%
The new JOB AID is clear, concise, and easy to use	**100%**	76%	24%

Q9.

Are there any other ServiceNow topics that you would like to have seen covered at the meeting?

- Difference between submitting a ticket for the **SDCOE department website** and submitting a ticket for a **program website** for enhancements

- Perhaps in cases where request are time sensitive, there could be an option provided to **classify the request to a higher priority**. Currently, the standard default is "low priority."

- Process for **setting up new computers**

- This is more of an idea....Is it possible to **pre-populate a ticket request for new hires that has a checklist of sorts** (I need a new Google, teams phone #, provide start date, etc.) that we can submit in one fail swoop as opposed to entering multiple tickets? I realize the way tickets are entered determines where they route, but when you are doing so many tickets things can fall through the cracks

- I will like the answers to the questions raised during the meeting such as **if a ticket is needed for new hires to install Teams and phone numbers for them**. How long can we expect and answer for the people who receive the tickets (other then George).

- I thought it was **thorough as-is**

- No

Q10.
Do you have any additional comments or feedback?

- Thanks for offering the **clarity and info**. It **helps admins** with their jobs
- The **screenshots for instructions** are a huge help, thank you. Great job team!
- Thank you for explaining **how assigning a ticket works**, that was very helpful.
- I appreciate **when teams take the time to create trainings that will make everyone's lives easier**. I know on the receiving end of all the requests, as more people become aware of all of the functionality ServiceNow has to offer, your lives will be easier just as ours are on the user end. This pleases me! Thank you :)
- Fantastic job on the **training** by all involved!
- *Share any **updates to ServiceNow** so staff are aware of any changes/revisions*
- Not really, but I love the **direction** where this is going and I look forward to seeing more. Great work!!
- ***Audio*** was EXCELLENT!!! (That should be a no-brainer, but sadly it's NOT! Presenters (Peyri, Tyler & Candace) were **clear, concise and VERY COMFORTABLE** with their material. BTW, the **graphics** were GREAT, helpful and clear!

Lessons Learned

- What worked well, where we can improve, what we're proud of

- Completed by the Core Project Team

What Worked Well

- Reaching out to 16 Admin Assistants and getting feedback drove the content – pain points, suggestions
- Leadership was receptive to the recommended changes and took immediate action
- Partnership between EPMO and CSS
- Working with Stacy Brandt (Communications) for effective and timely communications
- Successful training meeting with 61 participants
- Successful COMET meeting
- Deliverables are clear, helpful, and easy to share/pass to new employees
- The request for a quarterly focus group meeting was one of the unexpected outcomes and a great idea

Where Can We Improve
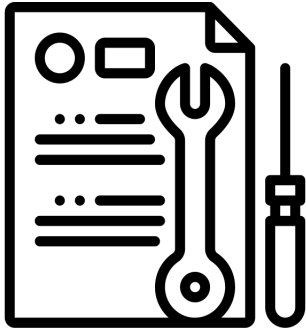
- Barely anything – this was a very smooth project
- Idea for improvement:
  - Improve the timing of any changes to ServiceNow so they don't occur on the same day as the training

What We Are Proud Of
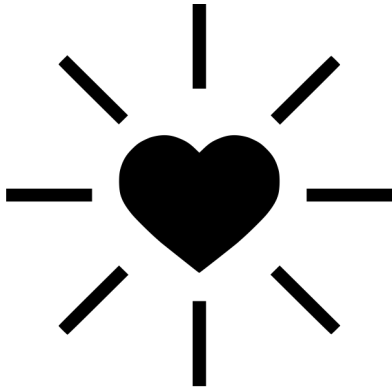
- The reception of the information, deliverables – high engagement, impactful
- Positive feedback from ITS senior leadership
- Quality materials
- We got a lot done in a short amount of time
- Everything was on track
- The racecar article in the May Inspire newsletter
- Used data to inform the project
- We truly listened to our customers

What Is Left
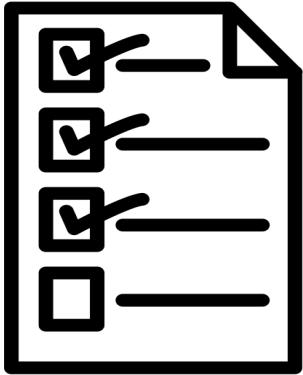
- Let's celebrate!
  - Celebration targeted for Thu, 5/27 (9:30-10 am)
- Capture post metrics
  - CSS Team will track # of side door requests for 9 weeks (May, June)
  - EPMO will run ServiceNow metrics (April, May, June)
- Long term:
  - Work with Stacy to send ServiceNow tips and reminders