

servicenow.

KNOWLEDGE24

Bring the power of playbooks to the people who need it most

CreatorCon Lab CCL1270

DJ Wolfson

Application Developer

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“

When UX doesn't consider ALL users, shouldn't it be known as “SOME User Experience” or... SUX?

Billy Gregory

Accessibility Program Manager at Ubisoft

Speaker introductions



Name: Carleen Carter

Title: Principal Architect

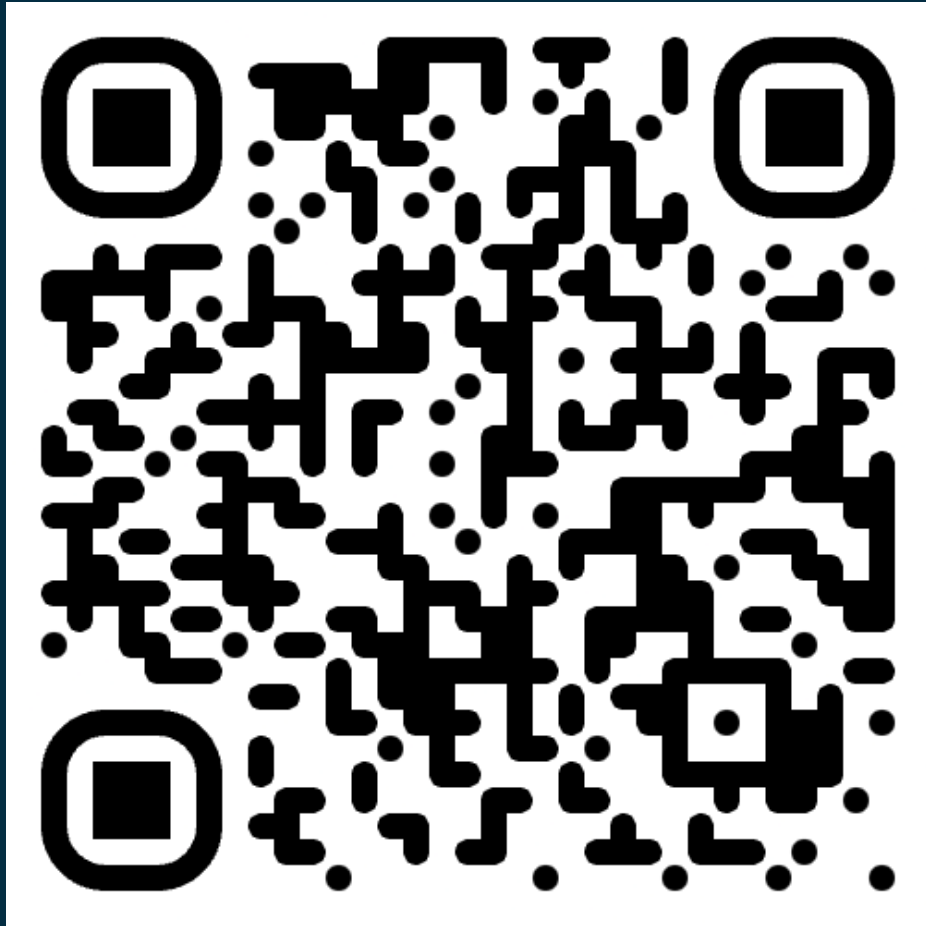
Company: Serenity



Name: DJ Wolfson

Title: Application Developer

Company: Serenity



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Agenda

ALL users

Problems to Solve

Playbooks in ServiceNow

Lab

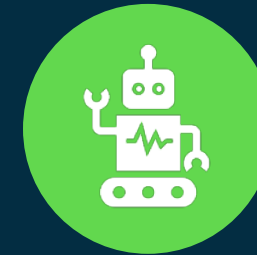
Exercise 1

Exercise 2

Exercise 3

Q&A

What does “ALL users” mean in UX?

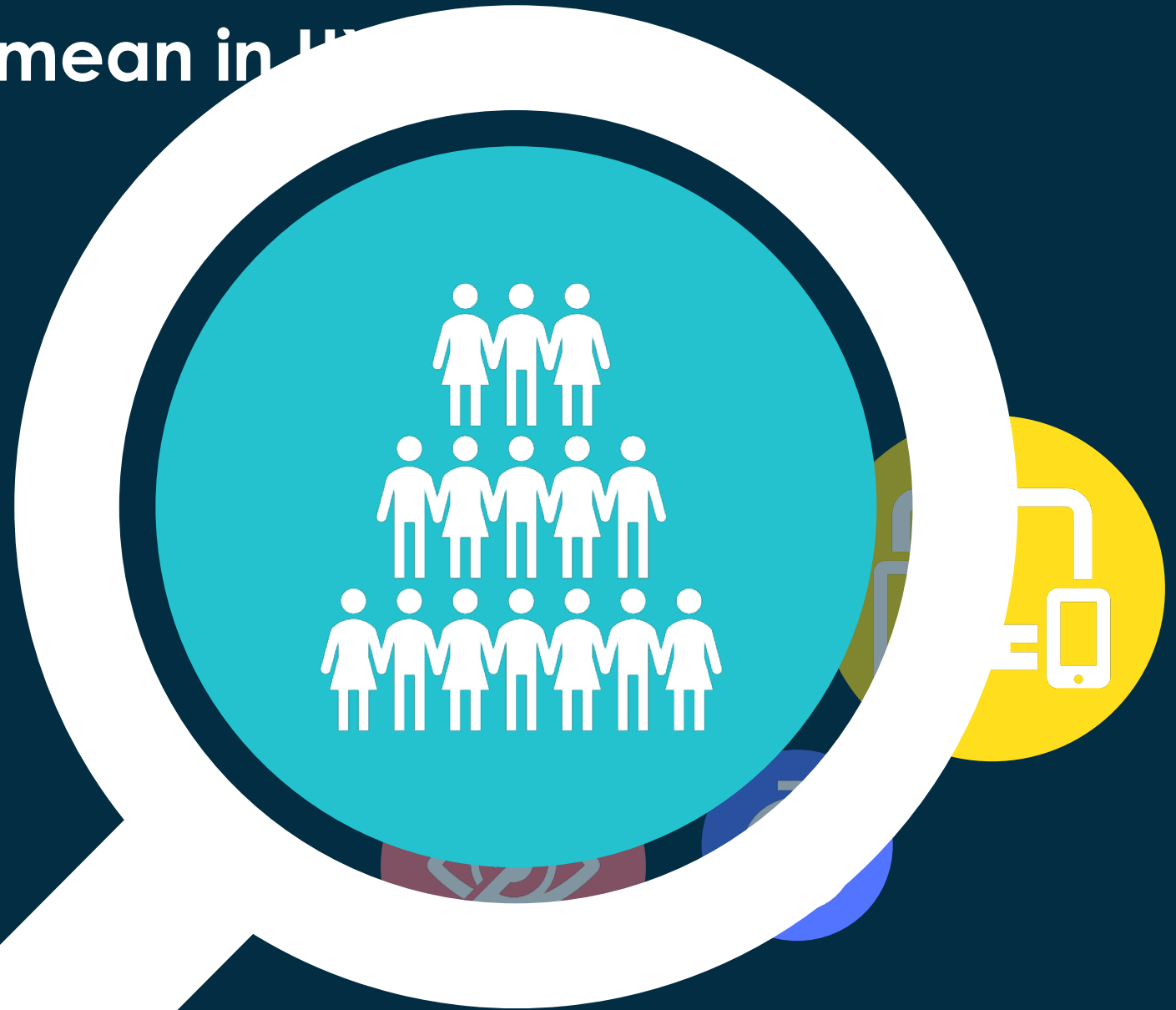


What does “ALL users” mean in ITSM?

Personas

End Users / Requestors

Fulfillers

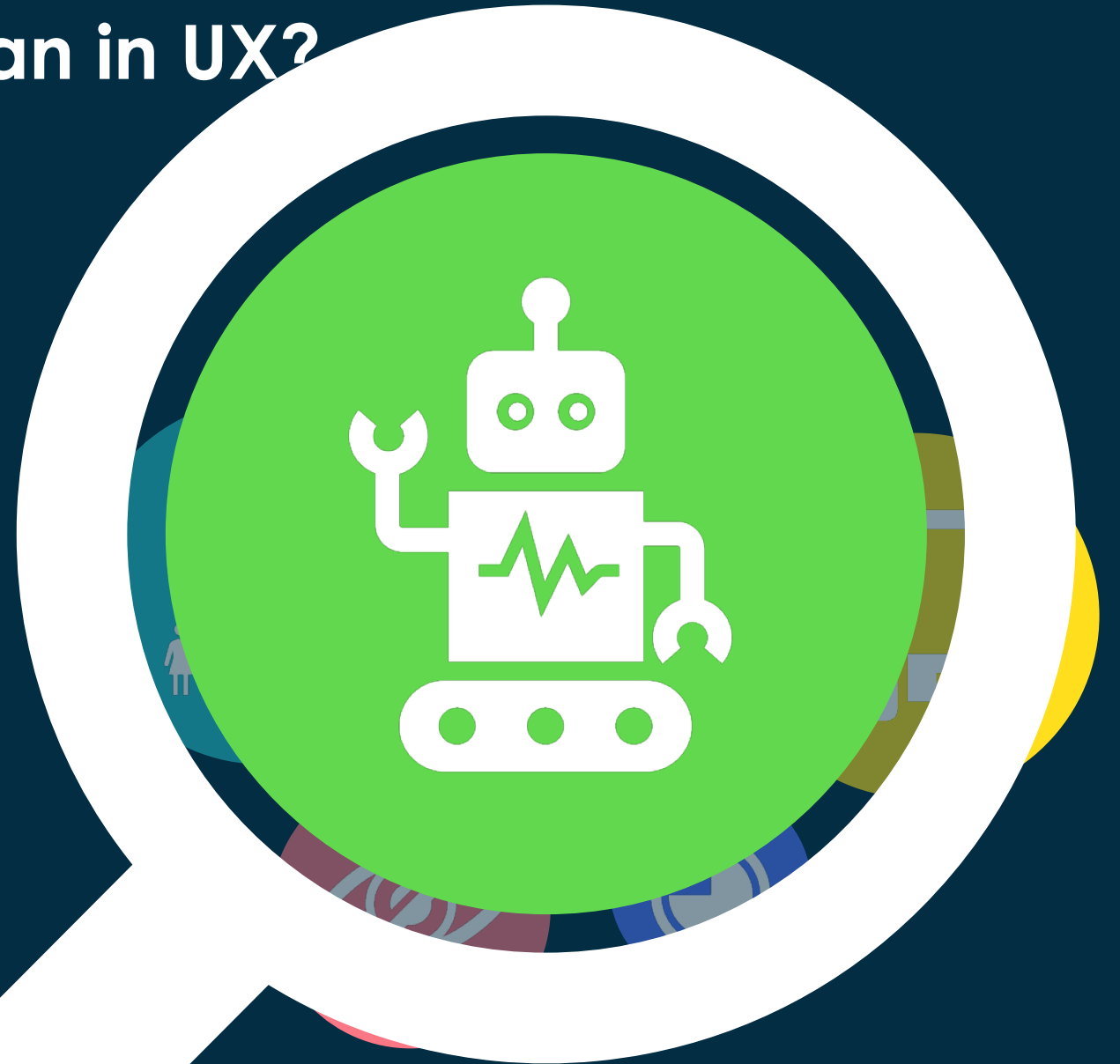


What does “ALL users” mean in UX?

Demographics

Technology skills

Internet speed

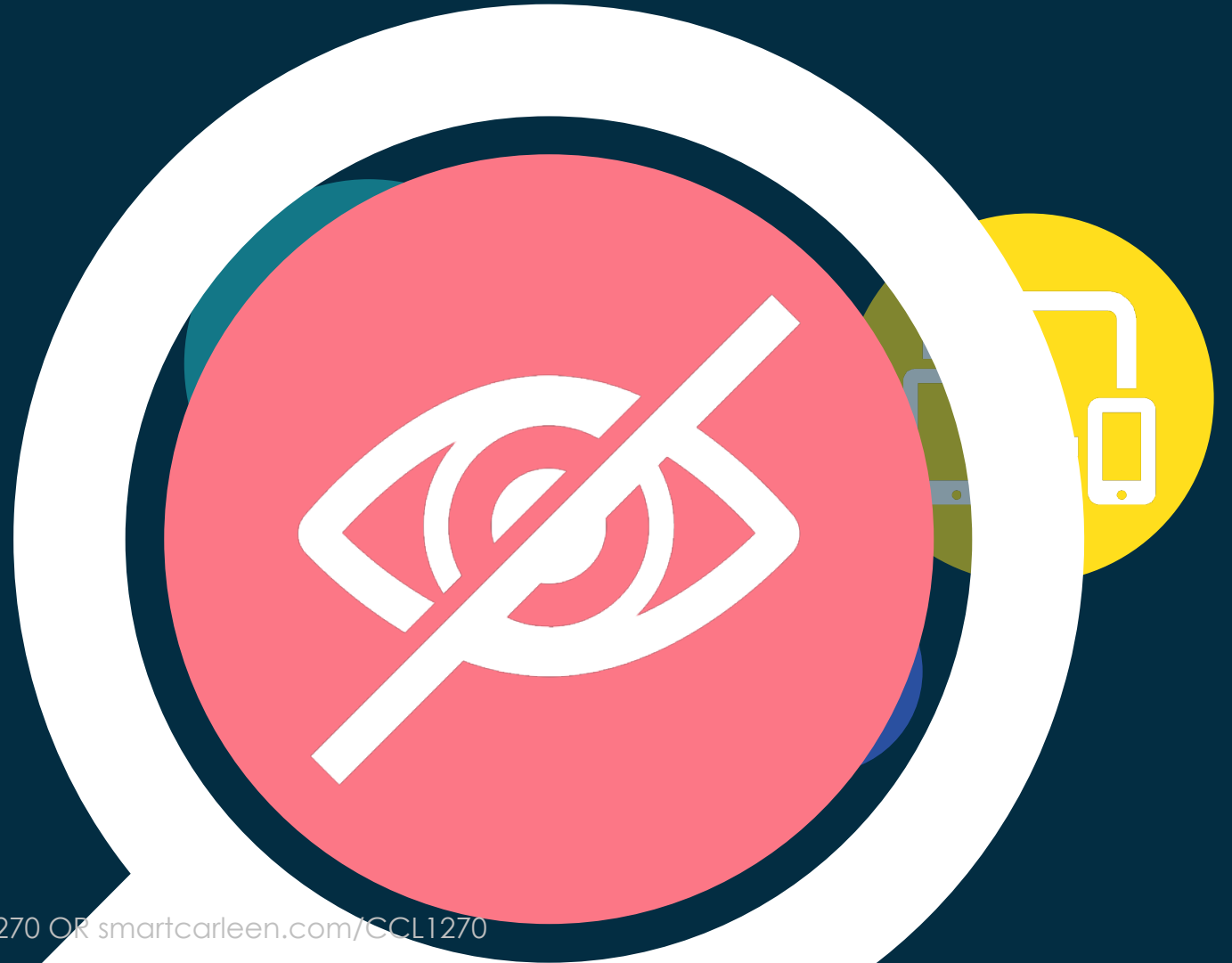


What does “ALL users” mean in UX?

Accessibility

Contrast ratios

Screen readers



What does “ALL users” mean in UX?

Format

Screen size

- Computer
- Tablet
- Mobile



What does “ALL users” mean in UX?

Frequency & Time

Frequency of use

Time to complete



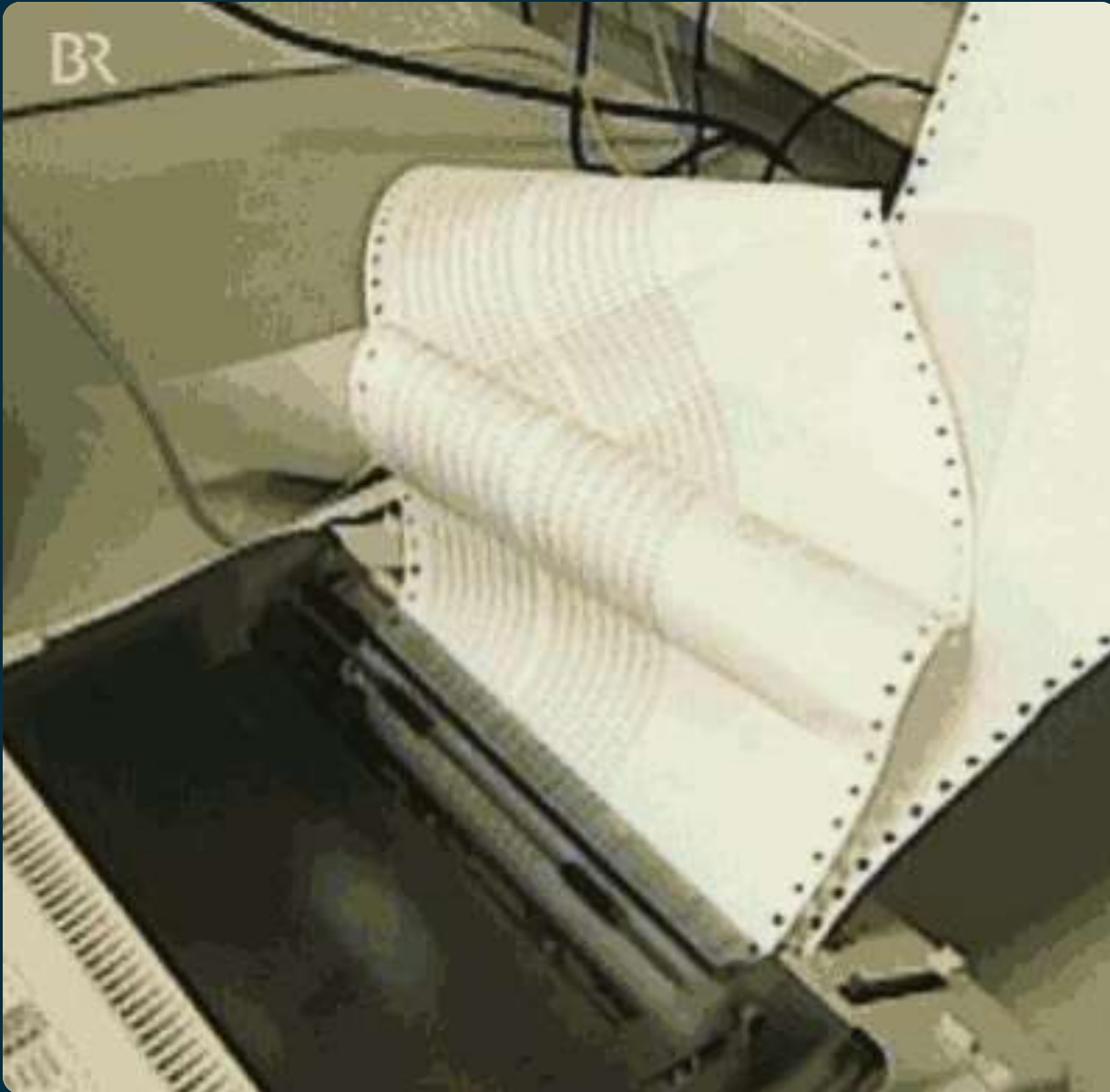
OK GREAT, ALL USERS. GOT IT!

WHAT'S NEXT?

**DIGITAL
PROCESSES
NEED DATA**

BUT

extensive
**MANUAL
ENTRY IS
REQUIRED**



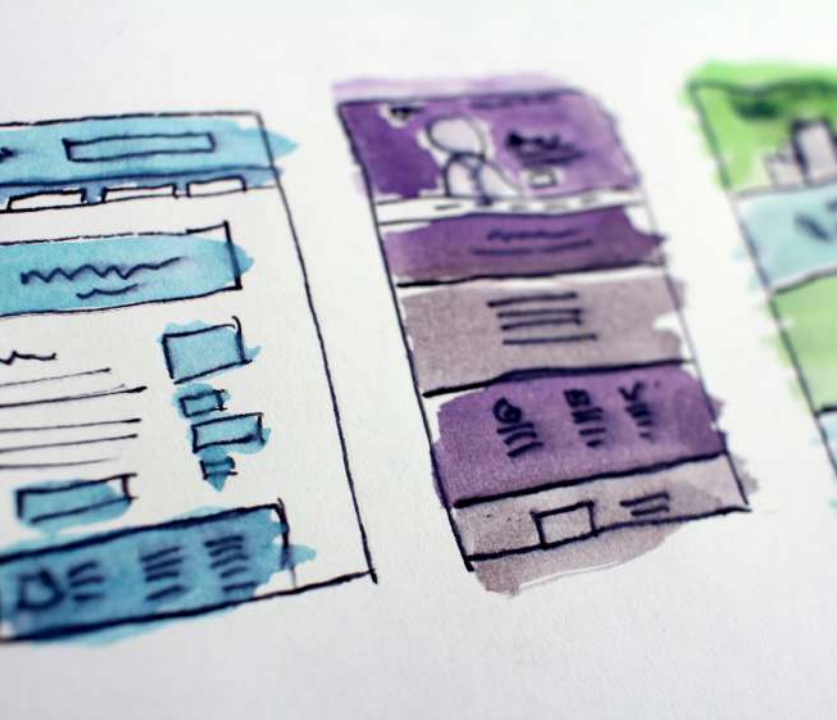
**Usually, we end up
with the form that
doesn't ends**

**...yes, it goes on and
on my friend.**

**Design
experts
say...**

**Collect
critical
data
upfront**

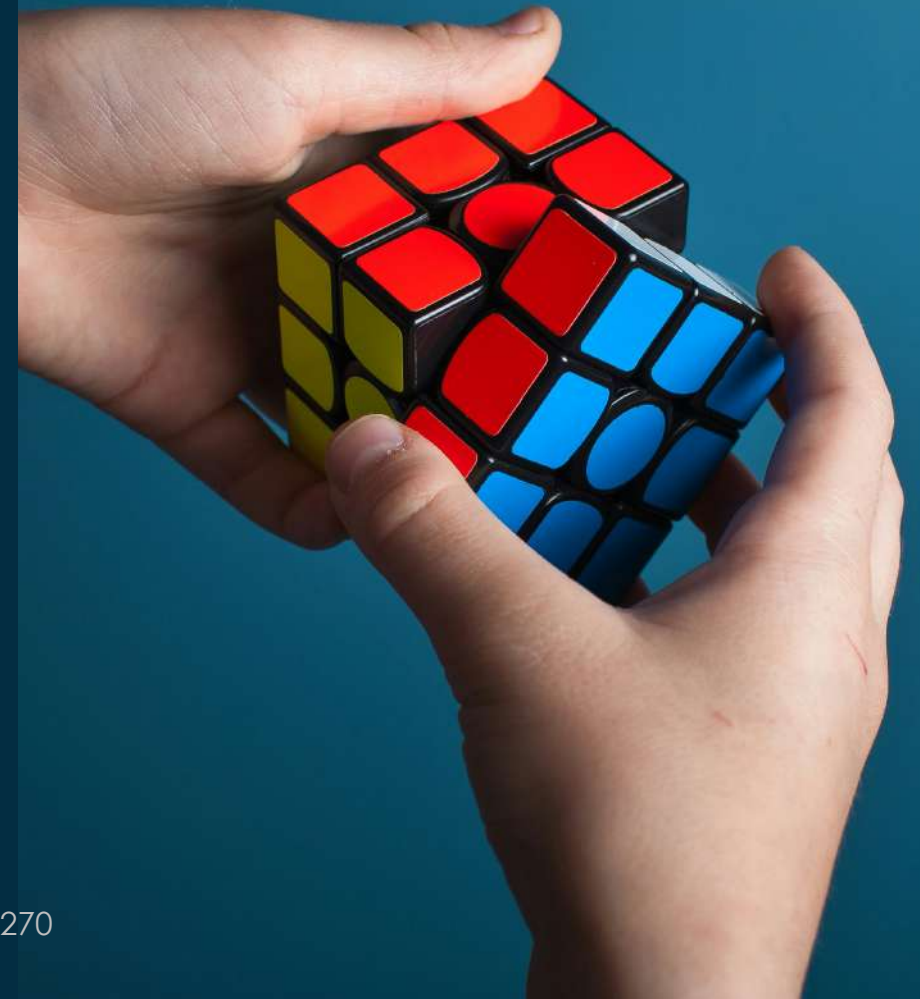
**Autofill
data you
already
have**



**Clearly
indicate
remaining
items**

**Group
questions
into
sections**

ServiceNow Playbooks are the solution



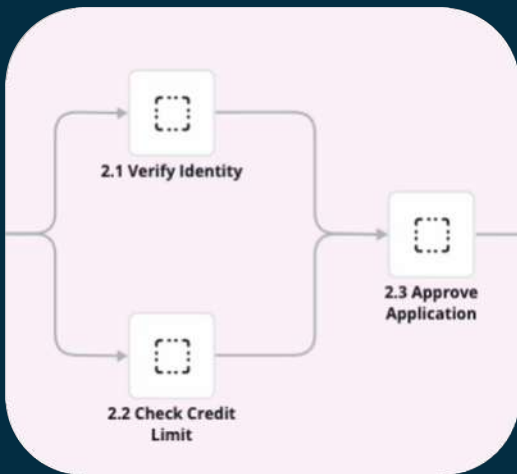
What are Playbooks?

Incident Response De...

- ✓ Identification Complete
- ✓ Logging Complete
- Resolve 3 remaining **1**
- 🔒 Closure 2 remaining

Playbook card status

- Complete
- Pending
- Skipped
- In progress
- Assigned to Fred Luddy



Playbook Workspace Demo

All Favorites History Workspaces

List

Lists My Lists

All 67

Last refreshed 17m ago.

Number	Opened	Short description	Caller	Priority
<input type="checkbox"/> INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low
<input type="checkbox"/> INC0009005	2018-08-31 21:35:21	Email server is down.	David Miller	1 - Critical
<input type="checkbox"/> INC0009004	2018-09-01 06:13:30	Defect tracking tool is down.	David Miller	3 - Moderate
<input type="checkbox"/> INC0009003	2018-08-30 02:17:32	Cannot sign into the company portal app	David Miller	3 - Moderate
<input type="checkbox"/> INC0009002	2018-09-16 05:49:23	My computer is not detecting the headphone device	David Miller	3 - Moderate
<input type="checkbox"/> INC0009001	2018-09-11 20:56:26	Unable to post content on a Wiki page	David Miller	3 - Moderate
<input type="checkbox"/> INC0008112	2019-07-29 11:48:43	Assessment : ATF Assessor	survey user	5 - Planning
<input type="checkbox"/> INC0008111	2019-07-22 14:04:57	ATF : Test1	System Administrator	5 - Planning
<input type="checkbox"/> INC0008001	2021-01-15 13:04:14	ATF:TEST2	survey user	5 - Planning
<input type="checkbox"/> INC0007002	2018-10-16 22:47:51	Need access to the common drive.	David Miller	4 - Low
<input type="checkbox"/> INC0007001	2018-10-16 22:47:10	Employee payroll application server is down.	David Miller	1 - Critical
<input type="checkbox"/> INC0006000	2018-08-30 01:06:16	Unable to access the personal details	David Miller	1 - Critical

Showing 1-20 of 67

1 2 3 4 → →

20 rows per page

What are Playbooks?

Building blocks

Triggers

A trigger specifies when to start running your playbook.

Stages (aka Lanes)

A stage is a grouped sequence of activities in a playbook. A playbook owner creates a stage to specify a logical grouping of activities. A stage in your overall business process.

Activities

An activity defines the Flow Designer content that powers the playbook's automation. An activity can also specify the user-facing experience that the playbook produces when it runs.

Roadblock

Playbooks can only be used
in UI Builder Experiences*

*In Washington, D.C. ServiceNow has released Service Portal widgets for Playbooks in select Customer Service Mgmt SKUs.



What's in Washington, D.C.?

Customer Service Management (CSM), Playbooks for Portals

CSM Enterprise or Pro SKUs

At least one of the following plugins:

- Playbooks for Customer Service Management
- Case Playbook for Onboarding
- Case Playbook for Complaints
- Case Playbook for Product Support

We expect that more baseline options will be coming from ServiceNow in future releases.



Check with YOUR ServiceNow Sales rep for details!

Application for Visa Platinum Card Actions

Assigned to: John Jason | Stage: Pre-Approval | Priority: 3 - Moderate | Product: Visa Platinum Card

Process | Activity | Attachments

Initiate | Pre approval | Data capture | Due diligen... | Resolve

Activities

- Check approval status
- Update customer information**
- Update customer record

In Progress Priority

Update customer information

Assigned to John Jason

Consumer *

Address Information

Mobile phone State / Province

Street Zip / Postal code

City Country

UI Builder vs Service Portal

Capability	UI Builder	Service Portal
Target Audience	Fulfillers	Requestors (End Users)
Portal Capability	Workspaces & small, departmental portals	Enterprise portals
Responsive	No	Yes
Pixel Perfect Design	No	Yes
Service Catalog	Very limited support	Fully supported
ATF Testing	Partial	Fully supported
Public Pages	Difficult to set up	Yes

Source: ServiceNow Product Hub for Next Experience

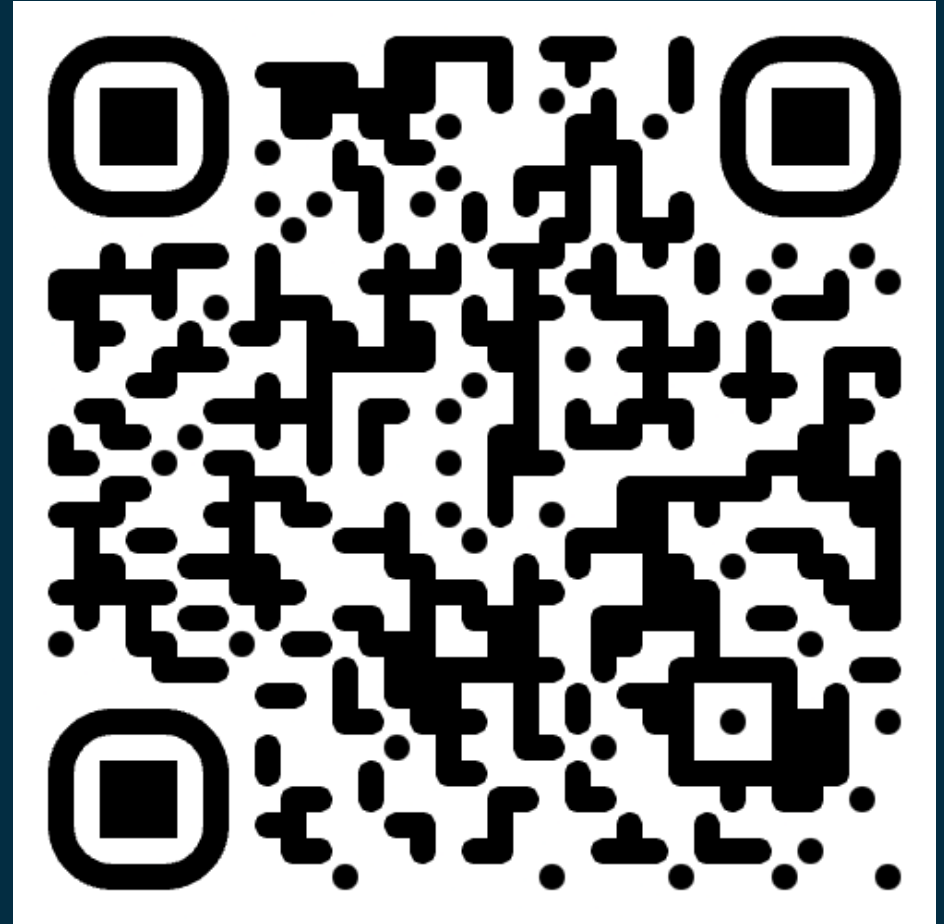


LAB LINKS

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Closing Points

1

Playbooks are not intimidating!

2

Playbooks are easy to build

3

Playbooks can be designed for any audience, not just fulfillers in a workspace.

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Q&A

Contact info or other content
can go here

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Thank you