

Case study

Global organization optimizes project tracking and visibility with ServiceNow

RSM develops portal to increase transparency and user experience

For global organizations, managing project workflow can be a daunting task, especially within the information technology sphere. Projects of various scopes and levels of urgency emerge that need to be prioritized and managed with an appropriate level of visibility so stakeholders know where efforts stand and that expectations are being met.


One of the largest privately held companies in the United States wanted to improve the overall experience of internal customers who engaged with its digital operations organization. That function sits within IT and is focused on providing support for existing applications and the company's underlying infrastructure and networks.

Enhancing digital operations experience

Company leadership launched an initiative with a goal of developing a project tracker that allows project teams and managers to know precisely where they are in the service process, from intake to completion. The digital operations team wanted to ensure that internal customers had access to a simple, intuitive and easy-to-use interface with tracking and catalog ordering capabilities.

"The problem we were trying to solve was twofold," said an executive. "We wanted to make the services the operations team can provide—either during or after the service—clear to the project teams and put all in one place. Secondly, we wanted to give them transparency into where they were in the process."

"The overall goal was to make the digital operations team a better place to do business with," the executive continued. "They can use our digital operations team, or they could go to a third party—they do not have to use this. So, if we are slow, or not transparent, or not a good partner to work with, people will go elsewhere."



All along, RSM has been fantastic, from understanding the problem, designing and architecting the solution, doing user experience testing to make sure it was the right solution, and then building the solution. I have been happy from beginning to end.

~Executive,
one of the largest privately held companies in U.S.



For the new delivery model, the company's digital operations team took inspiration from another well-known tracking tool: a pizza tracker commonly utilized for web and mobile orders. However, the executive knew that the functionality would need to be more extensive for the digital operations team model.

"When you're ordering a pizza, you're clear about what you want at the start—you don't change your mind about the toppings halfway through the order," the executive said. "In the world of a project, scope changes constantly. So, while the pizza tracker was the North Star, the reality is these are individual projects that might need some infrastructure at the start, and halfway through the project, might need more."

The company had previous experience with RSM's ServiceNow team within several workstreams and lines of business, and leadership went to ServiceNow to determine if an existing, off-the-shelf product could align with its goals in the digital operations organization. When nothing quite fit the bill, ServiceNow suggested that the company work with RSM to develop an effective solution.



Collaborating to develop the right tool and approach

Resources from RSM US and RSM Canada took the company's high-level, complex business requirements and began developing a custom solution mainly using out-of-the-box ServiceNow tools that could meet the company's needs with easy maintenance moving forward. The RSM team took a methodical approach, bringing in resources with deep experience in project management, ServiceNow service portal development and design, and ServiceNow custom app development to work alongside the client's digital operations team to bring their ideas to life.

"Quite frankly, the RSM team has been fantastic in terms of really asking the right questions to understand the problem in a bit more detail and coming up with a solution," the executive commented.

RSM carefully considered and validated the digital operations team's functional and technical requirements and overall user interface considerations and presented weekly custom portal mockups and back-end custom app configuration for review and feedback. The process was very iterative in nature, producing numerous modifications and improvements before the final product was approved by the client.

"RSM worked with some of our key stakeholders internally to make sure we got the alignment with the people we needed and tailored it so it was the right solution," the executive said. "They understood the problem and helped us to architect and design a solution. The team that built the solution was also brilliant, using the Agile approach and providing reviews every week to gather input."

With the importance of overall user experience and adoption, RSM also heavily leveraged the firm's design team to ensure the application had an intuitive approach and user interactions were optimized.

"The icing on the cake was the involvement of the human-centered design team from RSM," the executive remarked. "They had some sessions early on to show our users the wireframes and walk them through the navigation. Being involved in that level of user experience design was really new to a lot of people. I found that part to be really impressive and a lot of the end users thought it was very helpful."

A successful launch with an eye on the future

The new portal, built on a ServiceNow foundation, launched with significant excitement from users and the organization about the increased level of transparency and efficiency for users. Within the first month of going live, the digital operations team received hundreds of project requests that were initiated within the tool.

The platform is intuitive for users, and saves time in many areas, such as reducing the need to enter project details multiple times. Many of those details are automatically pulled through. However, the executive sees opportunities for further optimizations as the system evolves.

"Initially, we focused on some big-ticket items, so there's definitely room for further expansion of things that can be viewed, initiated and tracked," the executive said. "We expect activity to massively ramp up throughout the year, and at the same time, we expect to get some really good insights from the data to optimize our processes internally."

With the portal in place, the company's digital operations organization now has a workflow solution that enables greater transparency. As the tool becomes further integrated, users will understand the benefits and efficiencies of working with the internal digital operations team instead of going elsewhere for support. In addition, the organization now has the insights to show the value it delivers to the company.

"We have gone away from relying on lots of human interactions which means it's hard to measure the initial effect," the executive said. "But going forward, now we have the data—each time we make a change, we can now confidently measure its impact."

+1 800 274 3978
rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute assurance, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed. RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.