Blueprint Ep 8 Transcript

Matt Espley: Hello everyone, and welcome to the blueprint on that essay. And as always, I'm joined by fellow CMAs Nate Weldon and Kendrick Wang. In each session of the blueprint, we break down key aspects of navigating digital transformation with ServiceNow. And as CMAs, we're here to help you understand the what, when, and why behind the strategies that drive platform value.

Matt Espley: And today we're focusing on upgrading to Zurich, the latest ServiceNow release. You know, we all know that upgrades are important and they're part of your platform's health and growth right. Twice a year, ServiceNow delivers new capabilities with tighter governance, smarter automation. And each upgrade is a chance for organizations to sort of shed technical debt, align with new out-of-box best practices, and unlock new innovations.

Matt Espley: And Zurich is a special one because it marks the end of the city based naming convention. You know, this journey has taken us from Aspen, Berlin, Calgary, all the way through Yokohama to Zurich. Each one of the releases has represented like a step forward in platform maturity from early ITSM roots through HR, security, customer workflows, and now really capping it off with AI driven automation in Zurich.

Matt Espley: So in this episode, we'll talk not only about specific Zurich highlights that we think are interesting, but also about what upgrading really means in general and how to approach them strategically, how to capture value as you go through the process and prepare your organization for for what's next beyond Zurich. So with that, let's start off with, Nate and and we'll just kind of run through some of the, the interesting things that we have coming in Zurich.

Nate Weldon: Sure. Before we get into that, did you want to talk a little bit about the strategy around upgrades and, and the, you know, everybody always the first question I always get asked is how up to date should I be? And my first answer is, well, it depends on your business. You know, Kenrick is in a heavy, a high secure environment.

Nate Weldon: You know, they have committed to being n minus one. So now that Zurich is out there, they are, you know, vigorously working towards upgrading to Yokohama. When Australia comes out, they'll be upgrading to Zurich. You know, the, the, the biggest delineate are with you know, the n minus conundrum is. Well, how long does it take you to upgrade?

Nate Weldon: Are you so customized that it takes you six months to regression test everything, and then therefore, you're in an N minus two situation, which, you know, now you're a full year behind. You're not getting nearly the latest and greatest tools or, features and capabilities in your organization. You know, they might be okay with that. And being in an N minus two situation is just fine for your organization.

Nate Weldon: But, you know, I would prefer you know, we're a customer to I always want to be on the latest and greatest. You know, Sara, our our platform admin and owner. You know, she's she's probably not too thrilled about that as it's always patches coming out and regression testing. So but we also have not customized heavily or where we do customize.

Nate Weldon: It's, it's, you know, usually in App Engine we're where it's meant for that. But, you know, I think that that's the that's the answer a lot of the audience might want to, might want to understand is how up to date do I need to be. And it's well, are there new features in Zurich that you absolutely need to use?

Nate Weldon: Well then, yeah, let's figure out how to get you on a quicker upgrade path. So it's you know, once patch one of a new release comes out, you know, it's always the old Microsoft Days wait for SP1 to come out before you upgrade to a new version of windows. You know, same thing with ServiceNow. There's going to be some bugs, and not everybody needs to be an early adopter.

Matt Espley: Yeah. Yeah, I would agree. I think, for the most part, what I see with clients is they want to be n minus one. They want to sort of shake out the, the bugs that come with potential, you know, potentially come with a new version. And unless you have a compelling reason with a new feature that's coming down the pike in the upgrade, you don't really need to be chasing the, you know, be on the bleeding edge of of the new features if you don't have a plan to actually implement them.

Matt Espley: Right. So I think that's part of being strategic about the upgrade is evaluating what's coming. And is it worth pursuing aggressively, or can you wait?

Kenric Wong: Yeah. And that's a good, good segue of why I, you know, is, is it is critical to have a, a CMA or at least, folk fest understanding your roadmap, your strategy of your business to at least help you navigate through that, because your strategy and your room app can already be created for the next three, five years.

Kenric Wong: But sometimes there are features that are coming in in the new upgrades that are going to be like, oh wow, we can get there earlier. Is there a way we can shift this? And that's how it the points of why the CMA then can collaborate with your leadership and the organization to even present you the capabilities that you currently have, your readiness of it, and then saying, you know what, we can actually ship this down now to this, next iteration of your development lifecycle to present you that.

Kenric Wong: So let's include and playing your zero upgrade for your roadmap. Because we were playing that for maybe a year from now because of your roadmap presentation. Right. So I think that's a good point for value delivery. Right. If it meets need and it matches your already strategize how you delivery we can shift it especially if it's on the roadmap.

Nate Weldon: Yeah. And well I mentioned a six month regression testing period right. If it takes you six months to regression test everything for your platform. I, you know, maybe it's time to look at ETF, mate. Or maybe it's time to look at some third party testing solutions to to start to expedite that. If six months is a long time.

Nate Weldon: Sorry, was I Matt.

Matt Espley: I said, or maybe you've over customized and you need to look for opportunities to get back at to have a box.

Nate Weldon: Yeah. Yeah. Absolutely. Yeah. Or you know get that back to baseline.

Matt Espley: Yeah.

Nate Weldon: So with that if there's no questions from the audience, you know, as always, feel free to raise your hand or type of question and, or type your question into the chat window and we'll do our best to pay

attention. We do have a moderator. Thank you, Kavya. And, you know, woo. And this is this is meant to be interactive.

Nate Weldon: So feel free to interrupt and ask us some questions if you'd like. So I'm gonna move on to some of the things that I've seen that are intriguing to me in the in the release notes. Some things I've already started digging in because, I think some of my, my customers will be able to take advantage of them.

Nate Weldon: You know, as, as soon as they are actually on Zurich. I'm not going to talk a lot about it. What I've seen from ITSM is, you know, it's it's a lot of agenda. I, it's a lot about making things faster. It's a lot about helping the tool get the job done. And, you know, I it's I just have not seen a ton of new, new features released in, in ITSM.

Nate Weldon: Except for the AI bits. And we'll we'll talk again about AI, in another session at nauseum. So, I one of the things I did see is for Cmdb, if you are in a greenfield or a zebo environment, the Cmdb edit roll is no longer embedded in the. It'll roll. So no more will your service desk agents or your change users or your problem users be able to just go in edit delete, update key status?

Nate Weldon: You will have to have the same DB edit role in these newer environments. And for the other customers who are who have been on the platform for years and years. We have a process that we go through that we can help you with for roll management and removing roles that have been embedded, like we've we've had a problem internally where the ATO role was part of customer project management.

Nate Weldon: So every project manager also happens to be an AI tool user in our system today, which is changing. So don't get any bright ideas Matt. But, that that I think is, is really huge. And I know that they've also done a lot of work recently to segment out, you know, just because you're a service desk agent doesn't necessarily mean you're ever going to be logging changes or working problems.

Nate Weldon: So it's they've done a really good job of, separating out all the access and the roles required for each of the ITSM modules. And now so even with roles and ACLs around Cmdb, which I know a lot of seem to be managers and owners get get a lot of heartburn about people messing with their data.

Nate Weldon: Next up, we'll, I'm going to cover one item because I think this is just a game changer for ServiceNow. They are releasing an MCP server so that you can tie in other chat bots and let them access data in your ServiceNow environment in a structured way. I use this today with, Hubspot's MCP server and Claude, and it is made just looking up deal information or customer information.

Nate Weldon: That's in our HubSpot instance. I don't have to log into HubSpot anymore. It's it's awesome. I'm I'm hopeful that I will get a similar experience from the ServiceNow MCP server, but I'm sure I get to configure and tell it what I want it to have access to as well. So I'm really looking forward to getting my hands on that.

Nate Weldon: That is I think what I know, MCP is going to be a foundational layer in between how, AI systems talk to one another.

Matt Espley: Yeah. That's awesome. Yep.

Nate Weldon: And now, as far as, platform security, there is some new capabilities around scripting governance. So you can have more granular control of who is permitted to script in your environment as well. You can do some things around checking for best practices in code. But scripting governance tool is also a new capability that I'm looking forward to taking a look at.

Nate Weldon: Especially because I don't tend to do a lot of scripting anymore. But I want to make sure that it is done in a sound and best practice way. Right. Always used apt get value. Don't just end that walk in. Those types of things. There is a new data type ACL, which is interesting to me, so that the intent around data type ACLs is within a table.

Nate Weldon: Instead of having to create ACL rules for all of a specific list of columns. You can use metadata and control access to those columns using metadata rather than specific ACL. For each of those columns. And then lastly, for around the security is there's a new MFA dashboard coming out or it's going to allow the platform admins, a lot more visibility into who is using MFA in their system and, who who still needs to sign up and enroll in an MFA.

Nate Weldon: For those of you that are using so, you know, ServiceNow is MFA usually doesn't come into play. But if you are not using, so for like your admin accounts, which I typically don't want people to do, using MFA is another layer of security, that I, that ServiceNow is now enforcing. But you can get exceptions and those exceptions need to be managed and monitored.

Nate Weldon: And at some point every admin, especially every security admin, needs to be using MFA when they're logging in locally, regardless of which environments it is. So MFA dashboard is going to help out, a lot there. Just to make sure I'm not running over my allotted time. Yeah. And then the last sorry was that.

Matt Espley: I was just going to add with the MFA thing, they make it very obvious that you have to do this when you upgrade. It's it's blasted all over your instance. Right. So there's no reason why an admin doesn't get that set up appropriately to either. Make sure that all those local accounts are either on MFA, or that they have their added to an exception group so that, you know, your bases are covered and then you can have that, that message go away finally and and call it resolved.

Matt Espley: But until you do that you're going to be constantly reminded.

Nate Weldon: Yep. And and that this now gives the platform owners that visibility into that which I think is, is great. And then next up we're going to talk about, release operations. So release operations from everything I've been able to dig into so far. For those of you that are familiar with the App Engine Management console, this is taking the concepts that are available in App Engine Management Console, such as pipelines and environments that are within those pipelines, and democratizes it across the entire platform.

Nate Weldon: So now instead of having to manually pull update sets using release operations, you can complete your update set and click a button. And that's going to add that update set to a deployment request. Your, your, company determines what you want that deployment to look like. You can go dev test prod. You can go dev test, sandbox, prod.

Nate Weldon: You know, however you want your pipeline to look. You can now have that. And you don't have to own App Engine for it anymore. So I think this is going to be a big game changer for platform admins and update set management, because along with being able to just push a button and then have some approvals happen, ServiceNow is also applying some and I'm not going to call it a health scan.

Nate Weldon: And it's certainly not instant scan. I think this is what a new a new iteration of instant scan is going to start to look like. But it, it uses something called deployment Analyzer. And out of the box with Deployment Analyzer you get five checks and it will run these five checks on every update set, regardless of, you know, what it contains.

Nate Weldon: Is there code changes? So has the script field changed within, an XML, or is this, a customer update record within that update set? Next up it's going to it's going to check if it has security roles. It's also going to check if it has new ACLs. So are we adding roles. Are we modifying roles?

Nate Weldon: And then are we applying those roles to new ACLs or are we just creating new ACLs? Next up is if it's only catalog item changes, which I'm sure if it's only catalog item changes, you can basically just say, yep, go to test. And then I automatically want to run some ATF in test on that catalog item.

Nate Weldon: And then lastly schema changes. If there are more than 10,000 records in that table and there are schema changes to it. And Rick, what happens when we make a change to the baseline cmdb table? It takes hours for that update set to promote. So these checks will allow you to run flow logic and say, well, you know what?

Nate Weldon: This this is violating our best practices. Or this is doing something that I'm not sure about. We need to put some extra scrutiny around this, and we're going to add some steps or some testing steps to our deployment task. Well. So all of these at a box checks can be used to control how that update set is going to be deployed throughout your environments.

Nate Weldon: And probably the first question we'll ever get asked around this is what can I create my own checks? And yes, you absolutely can. And this is where I think the intersection between instance scan and deployment analyzer will start to occur. Because with an instance scan you can you can run it against an application scope, you running against the entire instance, or you can order it against an update set.

Nate Weldon: So I think this is where we're going to see a melding of instance scan and deployment analyzer. In the future. That's, that's my guess or my hypothesis. Don't hold me to that one. The one thing I don't know. And and it would not surprise me if it did not work on batch update sets in this initial release.

Nate Weldon: So that I'm not positive about, we'll, we're going to get in there and we're going to do some testing. I haven't gotten ton into, you know, playing with all the new features, but this release operations, you know, I, I fully plan on, working on this with one of my customers as soon as they're ready to get up to Zurich, because I think this will help.

Nate Weldon: It'll help streamline their operations in the global scope. Or if they are not doing something using citizen development and App Engine Management console, now they can use the same concepts and streamline their deployment lifecycle between dev, test and prod. I think it's going to save a lot of time and it's also going to help us make sure we're not introducing bad code back into the environment as we're going through and and remediating health scan findings.

Matt Espley: Also.

Nate Weldon: There was a lot I talked very quickly and I apologize again. If there's any questions, please, please feel free to raise your hand and ask.

Kenric Wong: No, I, I like all those features you mentioned. One of the features that I noticed in Matt started off perfectly with, you know, just the evolution and the innovation of ServiceNow starting from aspirin all the way through. And for those of you all that on this, call here, if you ever use the the man or projects and known it as it just that evolution of what they came from to the SPM component, which is one of my favorite product lines because of the strategical scope that we live in.

Kenric Wong: The CMAs, seeing that visually to help us drive some of the roadmap and decision making, the transformation that they did from even from, Tokyo all the way through Zurich, enhances not only the capability of just the SDM products of projects, demand resource management, but there's a lot of things that now underpin that. Which is your agile development team, right?

Kenric Wong: How they use the agile 2.0 and now it's been migrated to ERP. It's connecting tissues to the enterprise architecture components. I know that currently, even for the, federal plan that we're on, we're moving into service mapping, and a lot of that connects to business applications. And what EA is doing in this new feature in Zurich is giving you the ability to visualize your model.

Kenric Wong: So there is a click of a button now within the platform, underneath the enterprise architecture workspace that builds out your data model of your business applications and all your servers mapped applications, services, your SES, your assets, and all the components, including any AI components that you have associated to some of these softwares and hardware components. Right. So having to be able to save time and visualizing your organization and all the services that it connects to your digital portfolios, for example, you no longer have to sit there.

Kenric Wong: I spent hours building diagrams. I know we all have sat there before, building diagrams out to show where our data models are, where data lakes are connected, and how does that interact with services. And with that, with those features being there, you're able to not only save time, but you're giving time back from a productivity standpoint. Right. Because I now is activating some of those capabilities with service.

Kenric Wong: With strategic planning, you're able to summarize your project reporting. So imagine you as a project manager overseeing a program and your project team is running different resources. Your timeline might have shifted or slipped a little. You want a way to be able to have a capability that's there natively? Now, that can help you drive an email notification saying, hey, your timeline, my, my slip now, because this path is now extended or your resourcing allocation is now one of them is over allocated and it gives you a summarized report very quickly now versus having to dig through a bunch of project statuses to figure out, are we still meeting that?

Kenric Wong: Are we still on the green? You can actually configure that now in the same space, which didn't exist in the last two versions of our, of the ServiceNow platform. So with that in mind, they made it even easier in Zurich to utilize the collaborative workspace management, where ITSM came with a service operating workspace where they can work underneath one umbrella as the all their tasks being assigned to them.

Kenric Wong: But what about the project team? What about the PMO? What about your arms? What about the folks that need to strategize and look at their roadmaps? How do they have a one stop shop for them? Because it wasn't really natively available in the other versions of ServiceNow was there unlock that for them, giving them that one place to be able to look at all their tenants, including some of the development teams like the agile and the test management teams, to show their tasks on the same board.

Kenric Wong: So it's a very transparent way of delivering service, but more for the operating team now. So those are some of the favorite features that I see from the SBM side and how they have evolved that capability. And for those of you, the enterprise architect who was formerly known as the Application Portfolio Management, that's now been can collapse into a much more user interface related, utilization.

Kenric Wong: So, the patches, some of those with some new capabilities in the item and item space, they have had a new, multi-line AI agents that can help, tier some of those, those softwares of hardware as well as

the CI discard repeated. They always had orchestration, but now they they've introduced now a capability now to help streamline some of the processes that we, you know, I mean, you're doing today on an item level and that's how low.

Kenric Wong: So just some of the things that are relevant to the client I'm working with and everything that we're trying to do. So I'm looking forward to Zurich obviously, where we're only upgrading to, Yokohama right now. As they evolve into we are staying at minus one. But with the new Zurich on that roadmap, we've not only planned it not to, can't read the next topic, but, it's on our our planning roadmap.

Kenric Wong: How are we going to get there? Because the features that you want to get to.

Matt Espley: So next. Yeah. I've been poking around at some of the HSD, features that are coming in Zurich and some of the general platform ones. I think that for me, some interesting parts of history are like, first of all, it's not necessarily capabilities, but they, they have, you know, your standard HSD that everybody knows and loves and then they have talent acquisition on the front end.

Matt Espley: Right. Like your your process of bringing applicants into the company where they will then be part of the HSD, and then also talent development on the other side once they're in, you know, doing things like, training and, and all those things that come with advancing employees and they kind of said, you know, all of this stuff now is under the umbrella of SDS.

Matt Espley: So going forward in Zurich, my understanding is that if you have like the enterprise skew, all that stuff is wrapped in now and then, you know, obviously the other SKUs, you'll have different pieces of that, but they're no longer three separate products. They're all under the SD umbrella. Definitely a lot of stuff like you guys mentioned around AI and I agents that help, HR agents work better.

Matt Espley: One of the really cool ones is the resolved HR case planner agent. So what it does is it's automating resolution for HR cases. And what it does, is it it it'll take a case that comes in and analyze all the, all the data on the case and, and use Rab to go fetch like CVS and catalog items and whatever it needs to find to help make a decision about, what to do with this case.

Matt Espley: And then it can update work notes and notification and essentially automate the entire, HR case fulfillment experience. But also it has a new mechanism in Zurich, where it also analyzes the the criticality of the case, and it can make decisions based on whether or not, you know, it should even attempt to close this one itself or send it to a human.

Matt Espley: And then if it does send it to a human agent, then it's going to do things like, this this case planner is going to look up potential instructions or policy documents or SAP cues, and it's going to compile what it thinks is relevant information and provide it to the agent so that they're walking into that case with it.

Matt Espley: You know, basically, hopefully everything that they need to make a decision. And then they either have the ability to approve or reject or modify the plan that the agent gave them. And it really saves agents a ton of time in, in managing their case load. So I think that's a really cool feature. That's coming in Zurich. There's also in Yokohama, they already have the HR multi instance integration, but they're coming with V2 in Zurich which is something that ServiceNow recognizes common enough in I think especially larger organizations where maybe just from having different business entities or mergers and acquisitions, and you have these sort of HR or shared service models in multiple instances.

Matt Espley: It's giving them the ability to essentially manage like HR approvals and document tasks and connect across instances and manage your entire employee base, across multiple instances. And it and it considers the fact that, you know, when you when HR licensing depends on how many employees you have using it. Right. So they also consider that if you're interacting with an employee across another instance, it's not eating up licenses.

Matt Espley: Right. So there's like an external user component to this where the provider instance, you know, it's it's recognizing that the users from the provider instance aren't messing with your licensing. And it's, it's, a prebuilt capability to enable you to manage, you know, your, your global, larger multi instance organization without a big headache or having to merge it all into one instance.

Matt Espley: Yeah.

Nate Weldon: The the agent you talked about reminded me of something that I, that I noticed, and I, it might have been Yokohama or it might have been Zurich. I can't remember, but there's an email handling agent and it's a, it's a, it's a platform based. I don't think it's actually associated to any of the products. And that the the intent is, okay, what is this person asking for via this email?

Nate Weldon: Are they telling me something's broken? Are they asking me an HR question? Are they or are they trying to ask for something to be fulfilled? So it does that sort of is it an incident, a request or a case analysis for you? And then takes it and hopefully routes it to the right task, a task type.

Nate Weldon: Yeah.

Matt Espley: I think that's already in Yokohama. I don't think that's new in Zurich. I think that's part of Yokohama. Okay. Mistake. Gotcha. There's also AI driven onboarding, ramp up plans that are new in Zurich, where you have a team of AI agents that are essentially coming up with, like the learning plan and tasking the employee and giving information to the manager, so that as they onboard and they ramp up with all the stuff that they need, we have AI agents now that are helping with that.

Matt Espley: There's updates to the pre hire experience where we have, like say a new secured pre hire role that we can now we have where we dedicate you know a pre hire experience that extends Employees Center.

Nate Weldon: And there's that externally accessible.

Matt Espley: Yeah. And so and same thing on the other end to like alumni is is getting more robust in terms of the ability to sort of register without a username and password into the alumni portal and some automation for off boarding as well, so that as people off board, they can register for the alumni portal.

Nate Weldon: That would be huge for us. But and jus problem with people that were alumni but were before they had ever implemented service. Now our HR, SB that that that this would have been huge.

Matt Espley: Yeah. And I think the awesome thing too is my understanding, like I said in the beginning, is that all this is getting wrapped into like HR enterprise skew, right? You don't have to have talent acquisition anymore to get the pre hire. If you're in an HR enterprise.

Matt Espley: Some of the other people have.

Kenric Wong: Something that, you know, because I know because of the new features in Zurich that is this something that like only a greenfield tech kind of get as a package or is there a way to still segment some of

these other components and package into the same? Is it more of a licensing and restructuring at that point?

Matt Espley: You know, I, I don't know the answer, but I would say based off prior experience where I've seen, you know, new features become part of it or sorry, existing features become part of a skew. Yeah. Generally it's you know, what I've seen is we worked with the ServiceNow rep and they confirm. Yeah, you know that's part of your skew.

Matt Espley: Now go turn it on. Yeah.

Kenric Wong: So that's my experience. Yeah. That was I was just confirming making sure that because I, I ran into a similar situation. In fact in our federal client they're asking the same questions too. So it's like, yeah, you know, how do they have.

Matt Espley: Yeah. I always ask your ServiceNow rep first. Okay. So that's what that's that's what I've been led to believe. That's the case. There's some cool features that I think, are worth mentioning. For example, scheduled jobs. Now, there's a more robust, list of ways to trigger or to schedule a schedule job. Now, you can do like a day of the month, you know, like on the second Wednesday of every month, for example, you have more flexibility in how you can do schedule jobs, which, you know, we always run into those totally random, scheduling periods that are now easier to do schedule jobs.

Matt Espley: There's a thing about audit retention roles that you can set up by tables. I haven't found much documentation on this, but it seems like what what you can do now is easily configure the audit retention for a given table and choose a time frame where it will, you know, obviously retain the the audit records for whatever table you decide you want to put, you know, some retention policy around, nice.

Matt Espley: There's slow history now where if you go to flow designer and you look up a flow, it's now going to keep track of the previous versions of your flow. So you can go back and refer to previous versions as they change. Right. So I think that's a big game changer to be able to go see the history of your flows and.

Nate Weldon: Like make content that a previous version is still running. It'll be easier to find that.

Matt Espley: Or if it's changed, you know, if it got customized and changed and now something's broken and you want to go back and see what the previous version was. It keeps I think I think it keeps a, a record of the last 100 versions of a flow. Oh, cool. Oh, that's pretty cool. Along the same lines with, with flow, there's, improved flow variables where now you can now it supports complex objects.

Matt Espley: Like, I don't know if you guys have ever tried to compile an array of, like, users in a flow where, you know, for whatever reason, you're looping through your collecting objects and then you need to do something with them, right? It's always been scripted and it's always been painful, at least in my experience. Now it's configurable. It's it's click and choose where you can build out these, complex object flow variables, which is awesome.

Kenric Wong: Yes, this is going to be handy where we're doing very similar on on the federal client here on trying to audit the tables of users activities. So just that logic that's going to help us drive that better querying and obviously better performance because that's going to be huge.

Matt Espley: Feature. Yeah, I would the last thing, that I want to mention is also around SLOs. So as you guys know, with the general best practice has always been like, hey, don't have one giant monster flow, use sub

flows, sort of build reusable chunks and some flow them together. But what ends up happening is like when you go look at, a request.

Matt Espley: Right? And it has all of these sub flows, it has like a parent flow and a bunch of sub flows. And then you want to like as an end user or somebody looking at a list view of these records and you want to see the stage, you know, which the, the request is that it only ever shows the parent stages.

Matt Espley: It doesn't show all those sub stages. It's not very intuitive in terms of like, where is your request currently? Now all of those sub flow stages, it's configurable to show sub flow stages and even to click and drag and reorder them so that when somebody looks at a request to see where that where it's at in in the process, now you can actually see all of those different sub flow stages and have a much better idea of where your request is at in the process.

Matt Espley: So that's it. That's those are my highlights for Zurich. So changing gears a little bit, I think, you know, it's worth talking about. You know, we've so we've reviewed release notes. We know we want to upgrade. What's the first step? What are the sort of tips and tricks for planning and getting ready for your upgrade? Well, like, what are some considerations that you guys think you should be looking at upfront?

Kenric Wong: Just right off the bat, I think if you've done an upgrade for, whether for ourselves internally for, for aero or even for your client, I think using your lesson plan as a baseline. What what actually was missed? What was something we could have done better and then understand that potentially you might have to actually truly plan it.

Kenric Wong: Right. It's not as simple as, oh, let's just turn on the lights. We can just upgrade. Right. It doesn't. It's not that easy, right? That it's one of those things where the lessons learned as a baseline, if you didn't have one before, one of the things is to say, you know what not to do next time, right?

Kenric Wong: Because it's not about what to do. It's what should what should we do and figure out how to fill those gaps. And then potentially your plan starts formulating a little bit better, right. Identifying all your pipelines. How many workstreams do you have? How many teams are going to be involved? Do we have the right resources for the design?

Kenric Wong: Do we now need to ensure, okay, like questions that might not have been there originally? So I think for the lessons learned to be one of the first steps. Right. What do we do wrong? How do we make this better. Do it.

Matt Espley: Yeah. And to elaborate on what you're saying, I think documentation, if you haven't previously documented your upgrades or it's sort of sparse and all over the place on your next upgrade, start with, with with that in mind that you're going to document every step and process along the way because you're making your life a lot easier down the road, and it saves a lot of time planning and executing your upgrade.

Matt Espley: Next time you know.

Nate Weldon: For me, it's your cloning strategy and making sure, you know, you're you're not going to test this upgrade in your production environment, you know, where do you want to start? And actually and I'm going to plug a new feature from ServiceNow. They've got this new sandbox capability where you can buy blocks of ten instances that are basically clones of whatever instance you want to apply your sandbox pool to.

Nate Weldon: You can apply to dev, you can apply to test. You can I expect you can also apply it to prod by it gives you a baseline or ten instances very similar that you can spin up at any time. Very similarly to PD, but they are exact replicas of whatever instance you, you've associated your, your block of ten to.

Nate Weldon: I think that's going to obviously there's going to be a price to this, but I think that in and of itself, you know, you could you can clone an environment into four different testing teams and have them not have each other step on each other's testing data. And just to expedite the process, so if this is something that your organization can can afford and can leverage, I highly recommend this because it's going to it's going to make it faster.

Nate Weldon: It's going to make it's going to allow you to streamline the process. And it's going to also allow you to not impact current development work or project work that might already be going on in your development environment. I think for us, that's one of the biggest sort of.

Nate Weldon: It's treated as an affront. It's just business. It happens. But it is definitely one of the things that I think drive project teams a little bit batty is in the middle of a deployment being told, oh, by the way, we're going to upgrade.

Nate Weldon: So we need to clone over all of your work and dev.

Matt Espley: Yeah, but even if you have good planning upfront and you stop development and you're ready for it, it's still very disruptive, right?

Nate Weldon: Yeah. It's. Yes. Yeah. Yes. Always. So I think this I think the sandbox capabilities are going to help you on.

Kenric Wong: On nay. It reminded me of a situation where right now. Right. We're going through our own upgrade, at the federal level. And one of the Scrum Masters came up and said, hey, you know, this is now the second time we're going to be doing this. And we keep on doing it at the end of our, API planning, which basically now we lose a week of development lifecycle because we're doing it at the end.

Kenric Wong: API is, program increments in that safe language of, sprint planning for your releases. So it's basically an.

Nate Weldon: Agile.

Kenric Wong: Bit different special flavor of agile. Correct. It is a safe terminology for, planning your sprints across multiple teams. But what's happening now is at that scale, there's 17 agile teams that we work with. And when you disrupt 17 teams, and clone right to your point map, even if at that planning the disruption is is it after or before the start of this.

Kenric Wong: Right. So we actually have to shift the schedule of our cloning because we, we heard that the teams were really struggling at the end of rushing things out the door for their release versus getting everything done. And before the start of the sprint that that low period, they're not developing anything anyways is safer. You know, back on your your development plans back out, your update sets back out of all the things using the sandbox as your preemptive like kind of, you know, to to not only clone but upgrade.

Kenric Wong: But it it prevented them from having the anxiety of rushing changes to cab. Right before the cloning versus the done. Now we're planning for the cloning in a low period of planning where it doesn't really need to be in the tool, and therefore, saving that kind of work. But yeah, huge, huge, huge thing. And since

we're on the topic of upgrading that, I think just making sure that that bridge is actually on your roadmap, like planning your roadmap to actually have upgrades called out versus, oh my God, Eric is out.

Kenric Wong: We'd like the features, but it's not nowhere planned on your roadmap, and you're trying to fit in and you just get and.

Matt Espley: Now you're getting forced by service now because two weeks to get it.

Kenric Wong: Done. Yeah, exactly.

Nate Weldon: Well, if you've not been diligently maintaining your skip blogs as well, you know that that's also part of this is your next upgrade. You might have a thousand to a few thousand skip blogs that, you know, maybe maybe there's an agent that can help with that. Why not? Not something I would want to delegate to an agent.

Nate Weldon: But, you know, to each your own. But, like, that's also part of, you know, good sound upgrade management is okay. You've customized something is the latest and greatest out of the box version better than what you've customized or the reason you customized? You know, so you should you should always be going through those as well and doing a good job of maintaining your skip blocks very kindly that you have in your very large Department of Defense environment.

Kenric Wong: We had less than 75 skip update sets, updates in our upgrade testing.

Kenric Wong: I think that's the lowest I've ever seen in any environment on any implementation during the rotations and, or seven years of different clients. And that is the lowest I've ever seen on such a large scale. Federal client.

Matt Espley: Do you know how many of those were actually like P1, P2 worth looking at even or were they.

Kenric Wong: Yeah. I mean, I would think there were 33% each, right? There was a couple ones because we had to I mean, obviously for the native, for the scripts. But the 33% of those were P4 and, couple P2 here and there, but not very many. Overall, I was very even even keel, which is very surprising.

Kenric Wong: But overall, I mean, it was just surprising across the board.

Matt Espley: Yeah. And one thing that I would also mention for everybody on here regarding your your skip logs is, well, first of all, in case you don't know what they are, when you upgrade, it tells you what was skipped, that you know, what features are you not getting updated because for whatever reason, like there was an error or you customized it so it's not going to step on your customization, but with the review process, come to your decision of are we keeping what's there?

Matt Espley: Or are we going to let the upgrade right over it and keeping it there? Obviously, like nothing changes, right? But if you are going to accept an update and write over your customizations, make sure that you understand. With that comes then the need to really investigate what the new feature is and is it going to, you know, how is it going to behave, make sure you test it and what downstream could potentially break, especially when you're looking at those P1.

Matt Espley: P2 is where script logic has changed. There's downstream effects that you know, can really throw a wrench into your entire upgrade process. If something breaks because of you, you know, because you accept some some new update.

Kenric Wong: Yeah. Matt. And to add to that, right, I think, from our side, what we did was one of the checklist things that you were talking about, like, how do you prepare for it is, you know, know what kind of products and services you are already utilizing right across your, your platform, and then looking at those features and capabilities and aligning with the changes that are occurring in your platform.

Kenric Wong: First and foremost, yes, there's going to be some cool things on other products that you might want to activate, but first and foremost, go ahead and understand what types of products using what products using right, what Cmdb products you're using that you're now aligning with the feature releases. So when you compare your skip update sets or updates that were being done, you can actually see what is actually, truly impacting your services versus, okay, we can put that on a roadmap and work our way into that versus, you know, having to accept or revert back immediately.

Kenric Wong: Just if you think you're losing out on something, right. Because if you're not providing the function and you utilize that function, you actually still might be safe to ignore for now. But know that this is now a documented linkage between what's new versus what you're not using and what you want to use. Right? So I think our next step is they're documenting the releases that you want to use and what's offered, and then mapping it back.

Matt Espley: Definitely. Yeah.

Matt Espley: No, we're we're at about 48 minutes now, so we got to wrap it up pretty soon. But what else about upgrades do you guys think is is worth mentioning?

Matt Espley: What do you what do you guys typically see in terms of, time frame and effort to get through an upgrade? I know it obviously varies by client, but what should what your clients expect when they approach an upgrade in terms of the amount of time it's going to take and time they should allow for it?

Matt Espley: Oh yeah.

Kenric Wong: Communication.

Nate Weldon: Yeah. I mean, as always, communications. I mean I always hate hearing from the developer that I didn't pay attention to slack or teams or didn't see the email and they didn't back out their update sets. Communications is important as far as like timelines. That's a tough one because how customized is your instance?

Nate Weldon: How much of the platform are you using? Right. I mean, so we are we're on the smaller side of service now. Customer base. We use a jar, we use SPM, we use ITSM, we use CSM. You know, a lot of our upgrades take probably about a month when you start to clone, do your testing, and then actually get the rest of the environments upgraded to that release.

Nate Weldon: You know, I'd say we are probably takes between two weeks and a month, depending on how much dedication we have.

Kenric Wong: Mean, I can actually say I mean, I can give you our current timeline right now. We started this upgrade journey. So we have project, task and all that stuff. August 21st. We will be in Yokohama by October 13th, but the finalization of all the cloning of our instances will be done by October 22nd. So your one to, you know, one month or so, it's a really aligned to that.

Kenric Wong: Right? Because it looks like it takes a little longer with our ten plus instances that we have. We have two different pipelines. We have about 15 ServiceNow instances. So you're looking at the largest scale of the instances to right to your point need like the size of your organization, how many ships, how many things you have to do in it.

Kenric Wong: How many instances do you really have to replicate this across your entire life? Right. If it's just 3 or 4 instances, in most cases, you know, it would take less than what we're doing, but we'll be done by October 22nd with lessons learned at the end of that. So it's it's it's almost a two month effort for us just to get to one version.

Nate Weldon: Yeah. And I've heard some customers it takes six months because, you know, it's, you know, it's a moderately sized team. But everybody is, you know, doing, doing other things. It's it just so depends. I don't, I, you know, I would say I would like it to not take more than a month.

Kenric Wong: That's like best case, honestly, that's usually a very automated way of doing things. And a lot of things you mentioned in your zero feature, right. To help automate some of those.

Nate Weldon: Yes. Yeah. And by a month, I mean a month with a high level of confidence that when you do your production upgrade, yeah, nothing's going to break. Now if you find that something has changed, there's something new in the product or an API has been deprecated and you need to do more, more stuff. Obviously that's going to take your time frame out.

Nate Weldon: But, you know, and in most standard environments, I think a month is the max. It should take.

Matt Espley: Yeah, I would agree. I think a month is is generally what I see from, you know, the very beginning of, of cloning and validating upgrade, skip logs testing, defect mitigation and upgrades. Yeah.

Matt Espley: Yep, I had a question, and I lost it.

Nate Weldon: I hate it when that happens.

Matt Espley: Right. Well, we're almost out of time anyway. So does anybody have any any last thoughts? And then we'll just wrap it up.

Matt Espley: No additional for the audience.

Kenric Wong: Have, yeah, anything for the audience, but definitely make sure your upgrades are value driven. I made sure it's it's actually meeting the business needs for them. Definitely. I mean, don't upgrade for the sake of upgrading. It's like you don't want to buy a part of a year, you know?

Nate Weldon: But outside of maintaining that, you are within compliance with supply and do policy. You know, I, you know, in, in some of the more heavily regulated environments, like some FDA customers that I've had to tend to work with, like they're beyond N minus two and they know they are, but it takes them more than six months to upgrade because of the the computer validation process.

Nate Weldon: That's an extreme situation. And that's there's a lot of heavy regulation behind why those upgrades take so much more time. Yeah. But I've heard it's even getting better in the FDA world. So.

Nate Weldon: It's always going to be different.

Matt Espley: Yeah. I think Kenrick, you brought up a good point here, though, at the end, which is.

Matt Espley: There are a lot of features that come with every upgrade. And before you turn anything on, like we've talked about in the past with you know, managing value and road mapping and governing the platform, figure out what fits into your strategic plan. If you're if you're looking at turning something on, go back and look at your strategic business objectives.

Matt Espley: What outcomes are you trying to get from this new feature before you decide to turn it on? And how are you going to actually manage it and communicate it before it goes live with a new upgrade? Because it's one thing to upgrade and have the the various changes that come with everything that you're already using, but trying to introduce a brand new feature as part of the upgrade that nobody really knew was coming is extremely disruptive.

Matt Espley: Yep, okay. Well, I don't see any questions from the audience, so I think we'll wrap it up. Thank you, everybody for tuning in to The Blueprint. I hope this episode gave you valuable insights into Zurich and ServiceNow upgrades in general. Be sure to join us next time and we'll continue to break down the what, why and when of service now capabilities and until then, take care and keep building.

Matt Espley: Thanks everybody.

Nate Weldon: Thank you.