

2023 ServiceNow insight and vision report

RESEARCHED BY

OMDIA

COMMISSIONED BY

NTT Data

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Summary

- **94% of businesses have a strategic ServiceNow roadmap and vision.** Having a clear and concise plan of action and roadmap as to how the organization uses the diverse set of capabilities offered across the ServiceNow platform is important in getting the most value from any investment.
- **74% of businesses say their strategic ServiceNow roadmap has changed this past year.** The way organizations plan to use the ServiceNow platform is evolving in line with important business goals and employee-centric changes and disruptions. Ensuring your strategic plan has the flexibility to adapt is of the utmost importance.
- **Just under half (44%) of businesses plan to adopt an industry specific ServiceNow solution.** Business interest in ServiceNow solutions that meet a particular industry's needs is growing. Organizations are looking for digital capabilities closely tailored to the needs of their specific vertical.
- **Improving digital experiences is more important for 68% of businesses now than it was 12 months ago.** Enhancing the digital experience for both customers and employees has become a key priority for businesses, many of which view ServiceNow as a platform that can help. Designing for ease of use and maximizing engagement is extremely important.
- Respondents view ServiceNow as a key support of broader business environmental, social and governance (ESG) goals. Among respondents, **86% believe ServiceNow will support their organizations' ESG strategy and objectives.**
- **Two-thirds of businesses are evaluating the relationship they have with an existing ServiceNow partner.** Businesses are actively exploring new ServiceNow partnerships. Partners must be attentive and deliver the capabilities and ongoing strategic support these organizations need to be successful.
- **68% of respondents report that their budget on digital will increase over the next year.**
- **Encouragingly, most businesses are planning to increase the budget associated with digital transformation over the next year.**

Omdia view

Responses to the 2023 ServiceNow Insight and Vision survey paint an interesting picture of how the world of work continues to change due to evolving employee demands, preferences and socio-economic disruptions. In transforming work and digital experiences, businesses face a diverse set of people, process and technology challenges in navigating the path to the future of work. Beyond this sea of change and disruption lies a great deal of opportunity for organizations to deliver better digital experiences and business outcomes. It will require businesses to invest in creating new digital infrastructures with effective processes and technologies. Doing so will help improve automation, cross-functional integration, and customer and employee experiences. Service management capabilities and the ServiceNow platform can be a valuable support for organizations looking to transform in this fashion.

Keeping pace with employee, customer and security changes is a top priority for digital transformation.

The 2023 survey results show that better leveraging data, improving sustainability, tackling cybersecurity complexities, and keeping pace with evolving customer and employee experiences are the most significant digital challenges businesses face going forward. How effectively service management practices and the ServiceNow Platform ultimately support businesses in tackling these digital transformation challenges and initiatives will be a key measure of success.

Service management has become a vital digital transformation competency and ServiceNow is a robust and reliable engine helping drive it.

Improving integration across different teams and functions is an important objective that businesses are increasingly relying on ServiceNow to help deliver. This integration effort should aim to better integrate not only people and teams but also the processes and workflows that guide how they get work done. The 2023 survey data shows that adoption of ServiceNow capabilities beyond the IT service management (ITSM) and IT operations management (ITOM) core is happening at an accelerated rate in support of the integration objective.

Omdia view

ServiceNow provides important support to the digital experience and sustainability objectives businesses are prioritizing.

The 2023 survey results show that businesses are attaching great importance to improving customer and employee experiences. Organizations now better understand the value ServiceNow delivers in improving these experiences. Additionally, sustainability is proving to be an important area to the internal digital agenda businesses are looking to deliver against. It's also a key consideration when organizations are deciding which digital partners to work with in supporting a digital transformation initiative.

Digital investment is set to increase as businesses look to navigate economic headwinds.

Realizing new business efficiencies with digital technologies is a priority in furthering investment and budget growth, even against a volatile global economic backdrop. The majority (64%) of respondents we engaged with say they plan to increase their digital capabilities budget over the next year.



Introducing the 2023 ServiceNow Insight and Vision Survey

Originally launched in 2018, the annual ServiceNow Insight and Vision survey provides a detailed view into the service management, business challenges and opportunities organizations experience while using the platform. For the 2023 iteration, NTT DATA worked with Omdia — a global and independent research and analysis firm. We developed and refined the survey and created this report to detail the findings, complementing the results with additional data and insights. Our key 2023 objective is to understand the digital shifts businesses are making, especially in response to economic and social disruptions.

This report summarizes the results of our 2023 survey. This year, we gathered more than 500 responses from organizations in the United States and Canada, spanning roles across different business functions, including IT, HR, facilities management and finance. The report discusses how new employee demands and changing workplace dynamics impact the digital transformation agenda. It also describes the important role service management practices and the ServiceNow platform will play in helping businesses manage this digital disruption.



Changing workplace dynamics have disrupted the digital transformation agenda

As work styles have changed, so have the challenges businesses face

The events of the past few years have resulted in a massive reorganization of the digital transformation agenda. Businesses have, by necessity, had to focus resources and better manage and secure a more diverse set of work styles and operational disruptions. Keeping pace with rapidly changing employee demands has also proven challenging. More employees work from new locations, with new tools and solutions. Businesses have, and continue, to face multiple workplace challenges in response to these disruptions. These challenges span areas such as technical support, security and making sure employees can work in a collaborative and productive fashion.

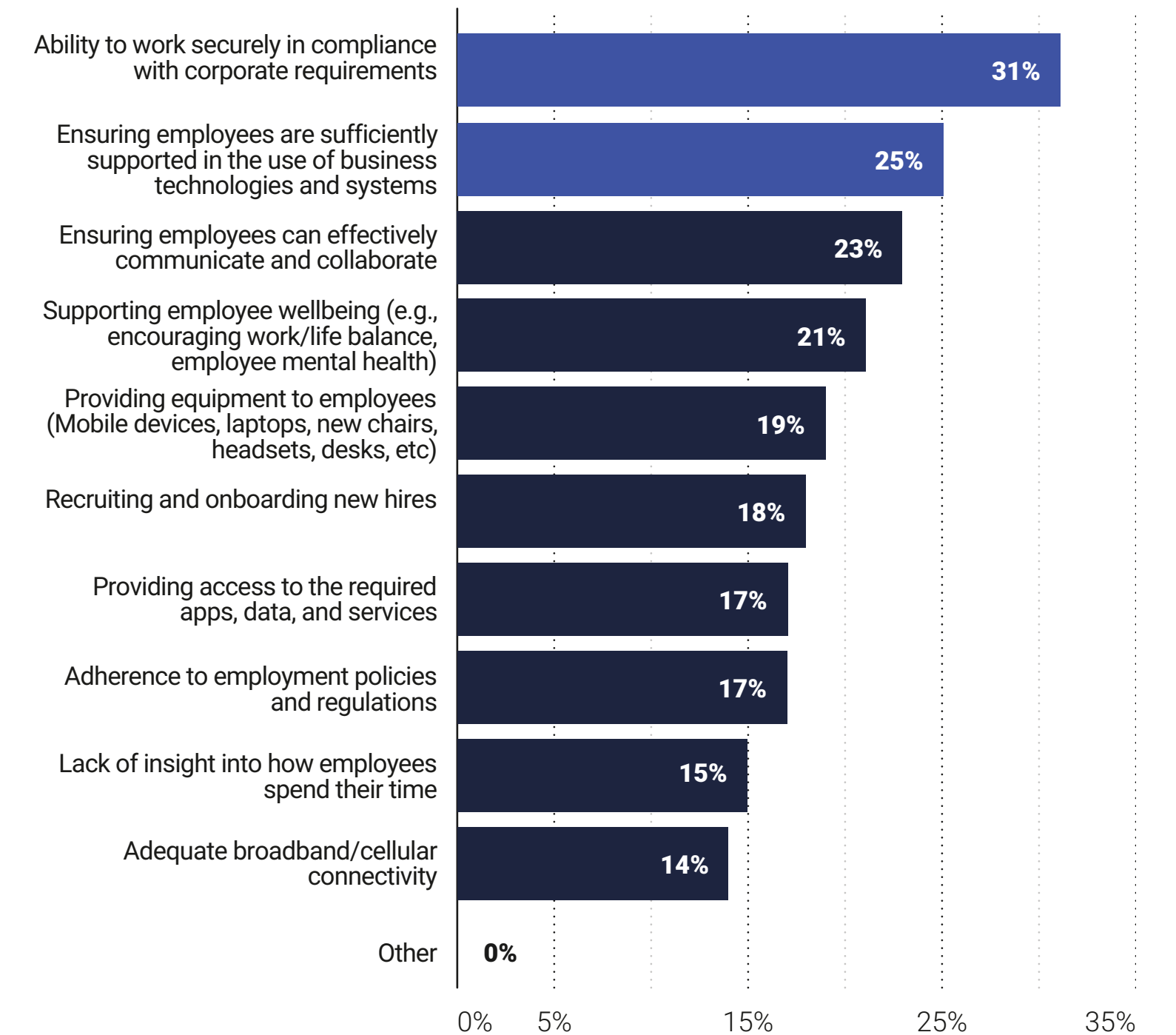
Notably, respondents identified the ability to work securely as a key challenge. This result reinforces the broader digital needs businesses are prioritizing;

namely, improving cybersecurity in response to an ever-evolving threat landscape. Employee support, regarding both technical and wellbeing aspects, has also been challenging for businesses. With its digital experience and security management capabilities, ServiceNow can play an important role in helping businesses better understand and positively impact these areas. Ensuring employees can communicate and collaborate has also proven challenging. Platforms like Microsoft Teams and Zoom have emerged to support businesses, acting as productivity portals from which many employees now choose to engage in business workflows. The important role these platforms now play in the employee experience means that ServiceNow integration into these productivity portals is increasingly important, especially in streamlining self-service and request fulfillment processes.

➔ Develop strong levels of engagement and communication between employees and business leaders in understanding the most pressing challenges within your organization.

What has your organization found to be the most challenging aspects of work over the past 12 months?

(RESPONDENTS REQUESTED TO SELECT TOP 2 CHALLENGES)



NOTE: N=520
SOURCE: OMDIA

Digital transformation is complex

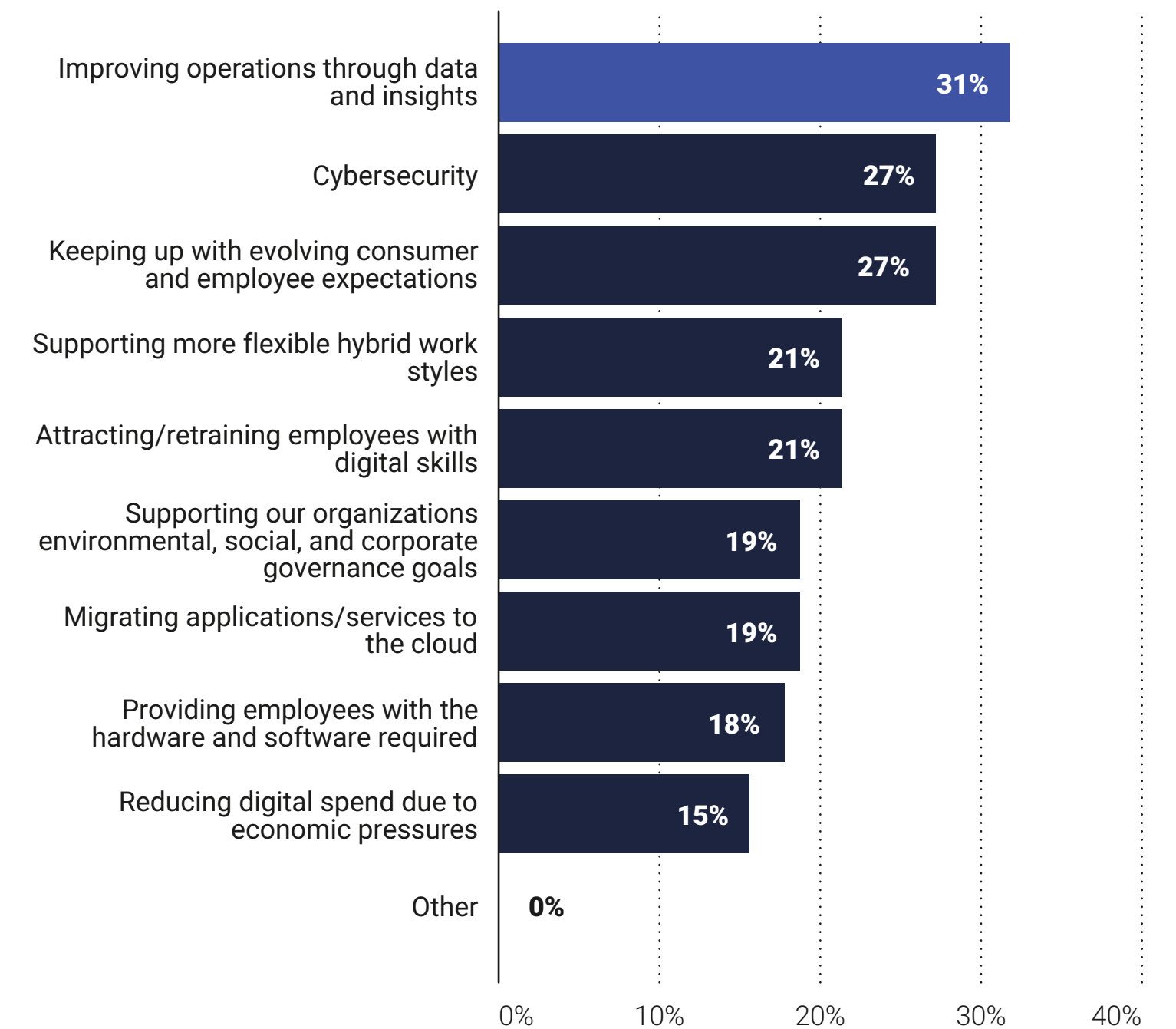
Digital transformation is a vast undertaking that embodies many different agenda items and initiatives.

Businesses often struggle to identify exactly where to start — something that’s hindered digital transformation processes in the past. Service management has emerged as a key enabler of digital transformation, largely due to the different digital initiatives and objectives the platform now supports. Determining where to start with any new digital initiative starts with identifying the broader challenges businesses anticipate and are focused on. It provides a good foundation for the essential engagement between digital teams and the business.

In our 2023 survey, organizations identify three significant digital challenges: optimizing business operations with better data and insights, improving cybersecurity, and keeping pace with evolving employee and customer expectations. Service management practices and the ServiceNow Platform can be an important support across all these areas. There’s also some variance across businesses from different industries. For example, within financial services, reducing digital spend due to economic pressures and attracting/retaining employees with digital skills are important areas. Respondents within the healthcare industry identify supporting more flexible and hybrid work styles as a key challenge.

What are the most significant digital challenges your business will face over the next 18 months?

(RESPONDENTS REQUESTED TO SELECT TOP 2 CHALLENGES)



NOTE: N=520
SOURCE: OMDIA

➔ Progress against any digital transformation objective will require organizations breakdown departments and people silos.

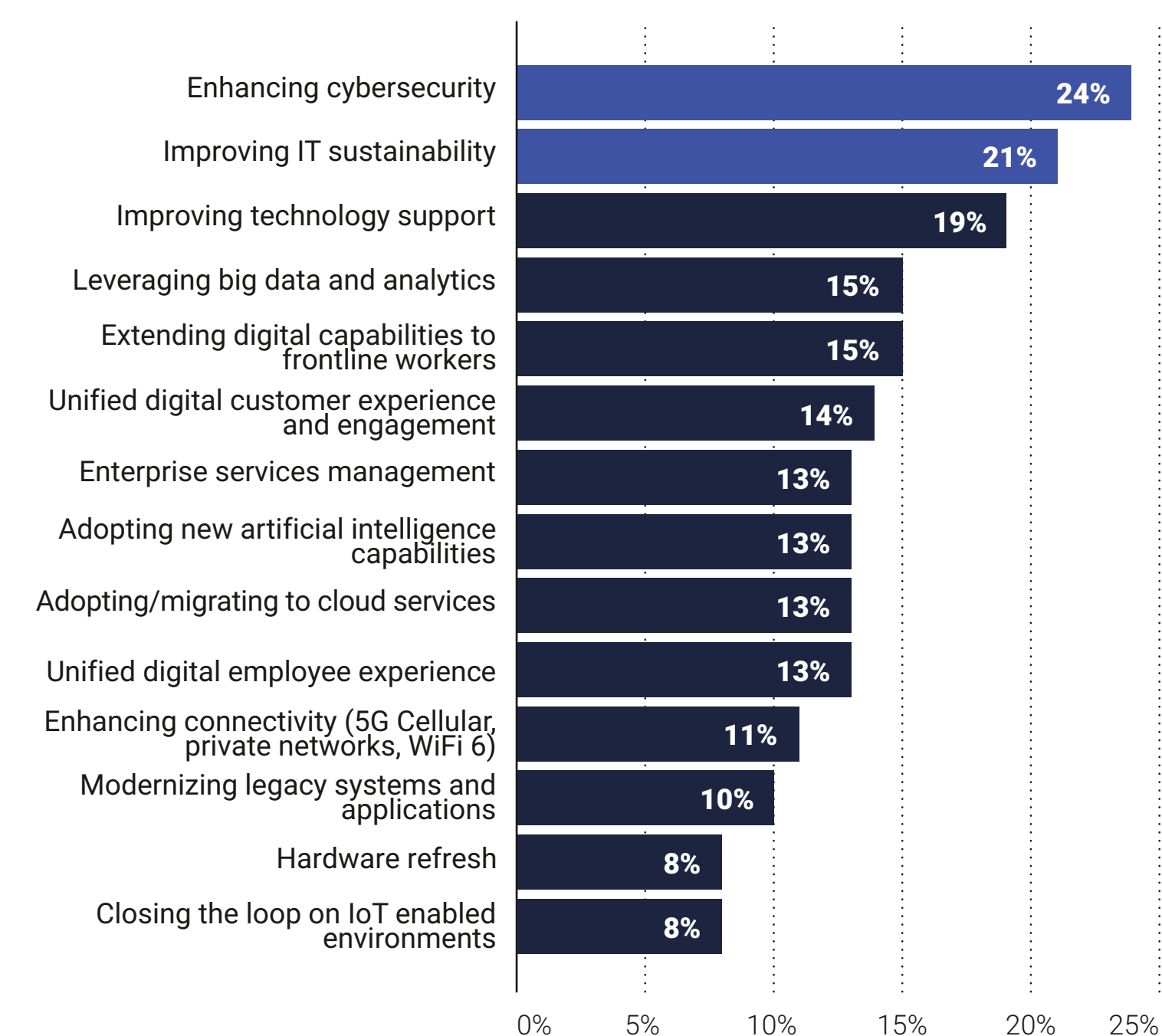
The digital agenda is being driven largely by a need to improve security and sustainability

As we look forward, businesses are attaching importance to a diverse set of digital transformation areas. Notably, improving cybersecurity and IT sustainability are important objectives, as is improving technology support. Diverse employee work styles, in addition to the broader and more complex security threats, have helped push cybersecurity to the top of most organizations' digital priority list. However, the diverse nature of these priorities once again shows that businesses need to operate with a level of agility and flexibility in embracing digital. Platforms, such as ServiceNow, that offer value and capabilities across these diverse areas will be an important support for businesses.

IT departments have an important role to play in supporting the broader business in achieving its sustainability objectives. ServiceNow and platforms like it continue to introduce new reporting and workflow capabilities. These improvements help organizations better understand and optimize practices that support an ESG agenda. As technology becomes even more critical to the way people work, the priority attached to improving technology support also increases. Businesses must empower functions like the IT support desk with tools that can automate support processes and help deliver more proactive technical help.

What will be the most important digital transformation areas for your business over the next 18 months?

(RESPONDENTS REQUESTED TO SELECT TOP 2 AREAS)



NOTE: N=520
SOURCE: OMDIA

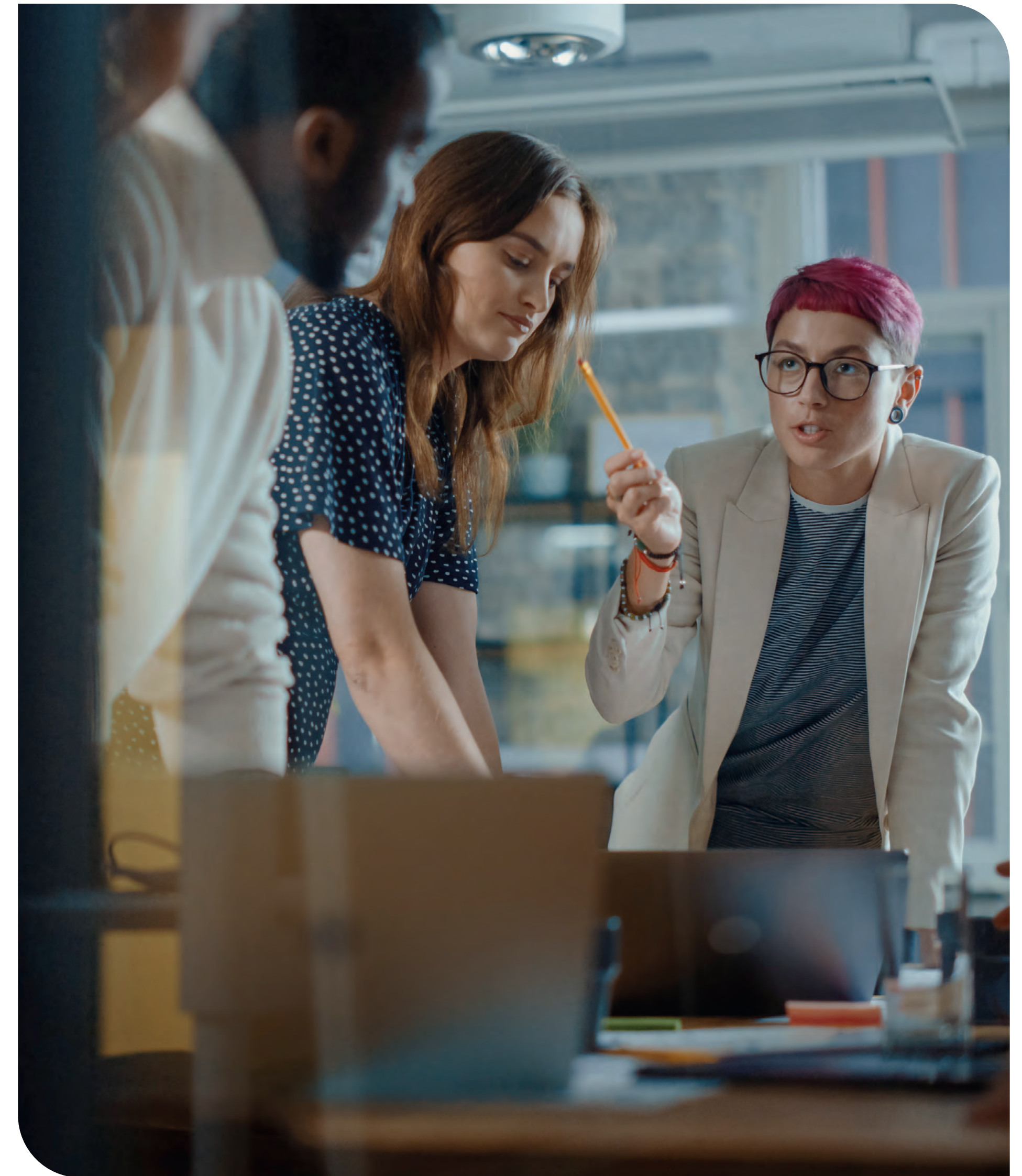
➔ If not already, businesses will need an integrated strategy and approach around cybersecurity, employee support, and sustainability.

Key takeaway

Digital transformation brings both significant challenges and opportunities. The speed and scale of digital change over the past few years has been unprecedented, so much so that it can be difficult for digital leaders to know where to start with any transformation effort. Some common areas of opportunity have emerged out of this complexity. Notably, a need to better digitize and simplify enterprise communications, enhance collaboration and employee experience, and accelerate efforts to empower more employees with digital capabilities, including connectivity and mobile technologies, are all areas of focus. How to orchestrate and digitize processes across the business that steer transformation is where ServiceNow will deliver important value.



If not already, businesses will need an integrated strategy and approach around cybersecurity, employee support, and sustainability.



Service management is a core digital transformation competency and ServiceNow helps drive it

The value of service management practices continues to grow well beyond the IT department

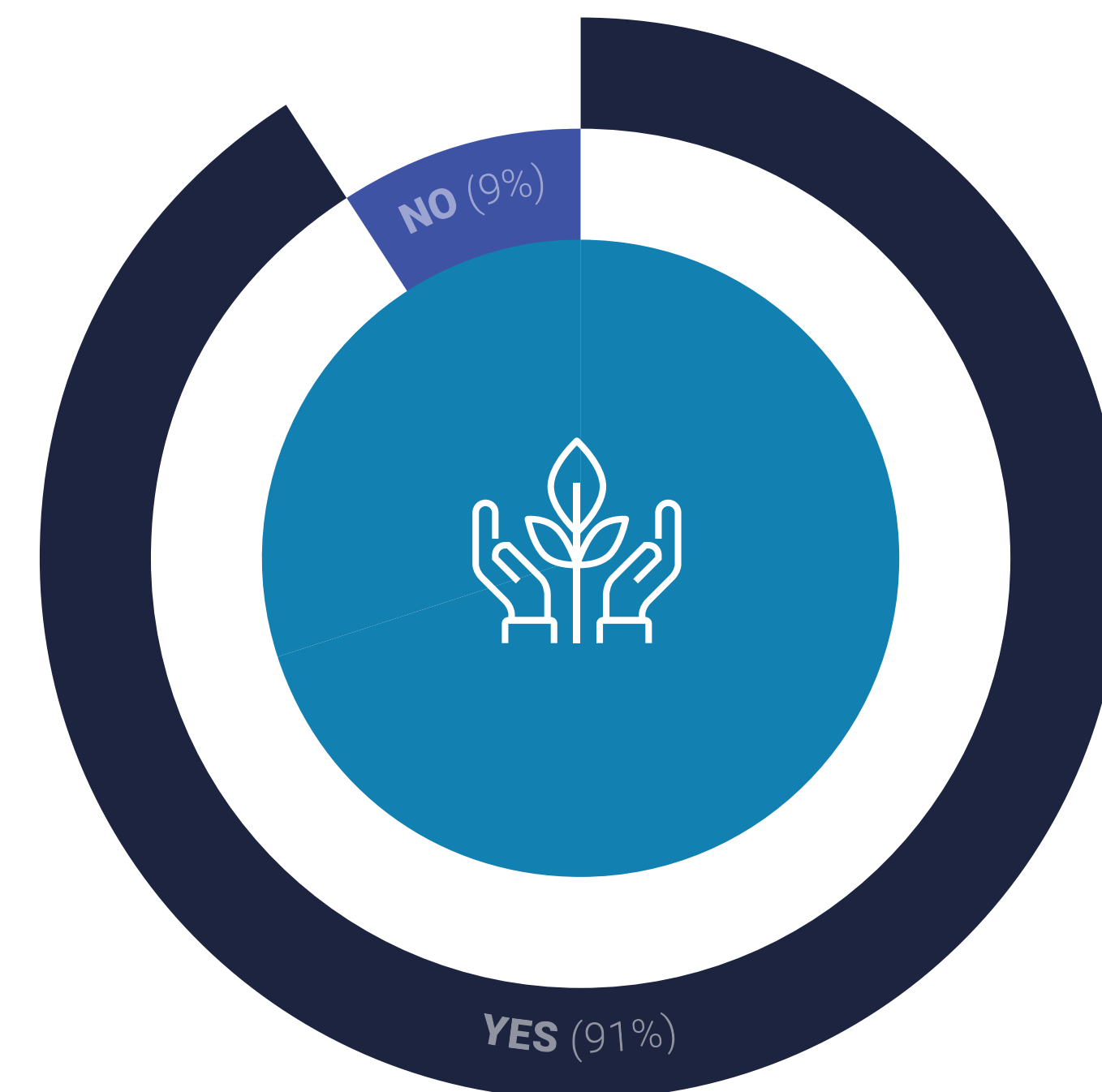
Service management practices and solutions provide invaluable support to broader business priorities and objectives. Service management technologies and practices are increasingly valuable for organizations that are prioritizing improvements across strategic areas such as ESG, digital employee and customer experiences, and cybersecurity.

Businesses view the ServiceNow platform as integral to supporting ESG objectives that embody the environmental, diversity, equity, inclusivity, and business governance elements that have become important to most businesses over recent years. Technology plays an important role in helping organizations successfully deliver ESG initiatives. Like employee and customer experience, helping businesses advance ESG is an objective ServiceNow supports via management and reporting capabilities. Respondents identify IT sustainability as a top-two business objective, so having the support of tools like ServiceNow is key to helping their organizations

achieve their aspirations. This approach resonates with ServiceNow customers; 91% believe the platform will support their organization's ESG objectives.

Respondents feel that ServiceNow will support their organizations' broader ESG efforts and objectives in multiple ways. Most notably, they view improving the efficiency of employee workflows and workloads as a key benefit. This capability is core to the ServiceNow proposition. The impact on the employee experience, governance practices and workplace efficiencies makes it an important ESG element on which IT teams can focus. The HR capabilities the ServiceNow platform delivers also support broader diversity, equity and inclusion efforts. Being able to define and document ESG goals was a top-three priority for healthcare organizations. More generally, many businesses view ESG reporting as important and will look to ServiceNow for support.

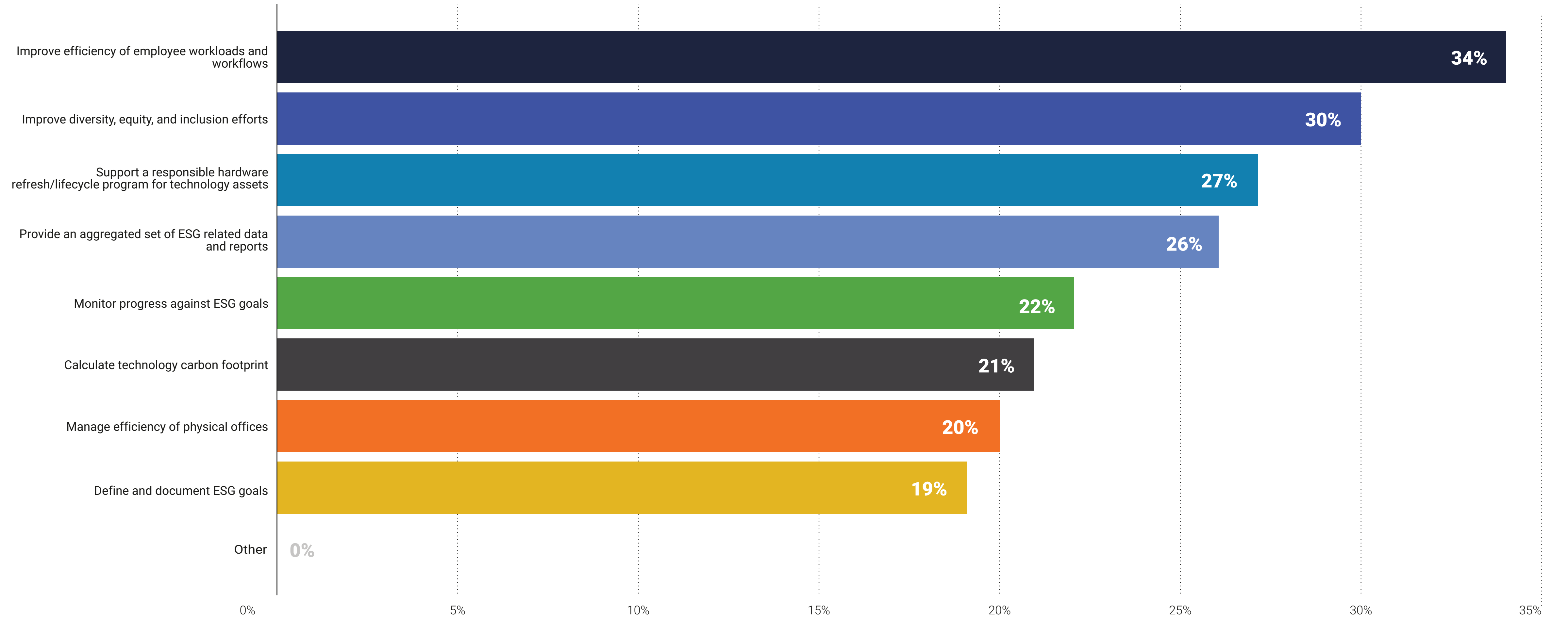
Do you feel ServiceNow will support your business's environmental, social and corporate governance (ESG) strategy and objectives?



NOTE: N=520
SOURCE: OMDIA

What are the priority ESG initiatives you will look for ServiceNow to support?

(RESPONDENTS REQUESTED TO SELECT TOP 2 INITIATIVES)



NOTE: N=520
SOURCE: OMDIA

Support for business transformation objectives is pushing ServiceNow adoption deeper into the organization

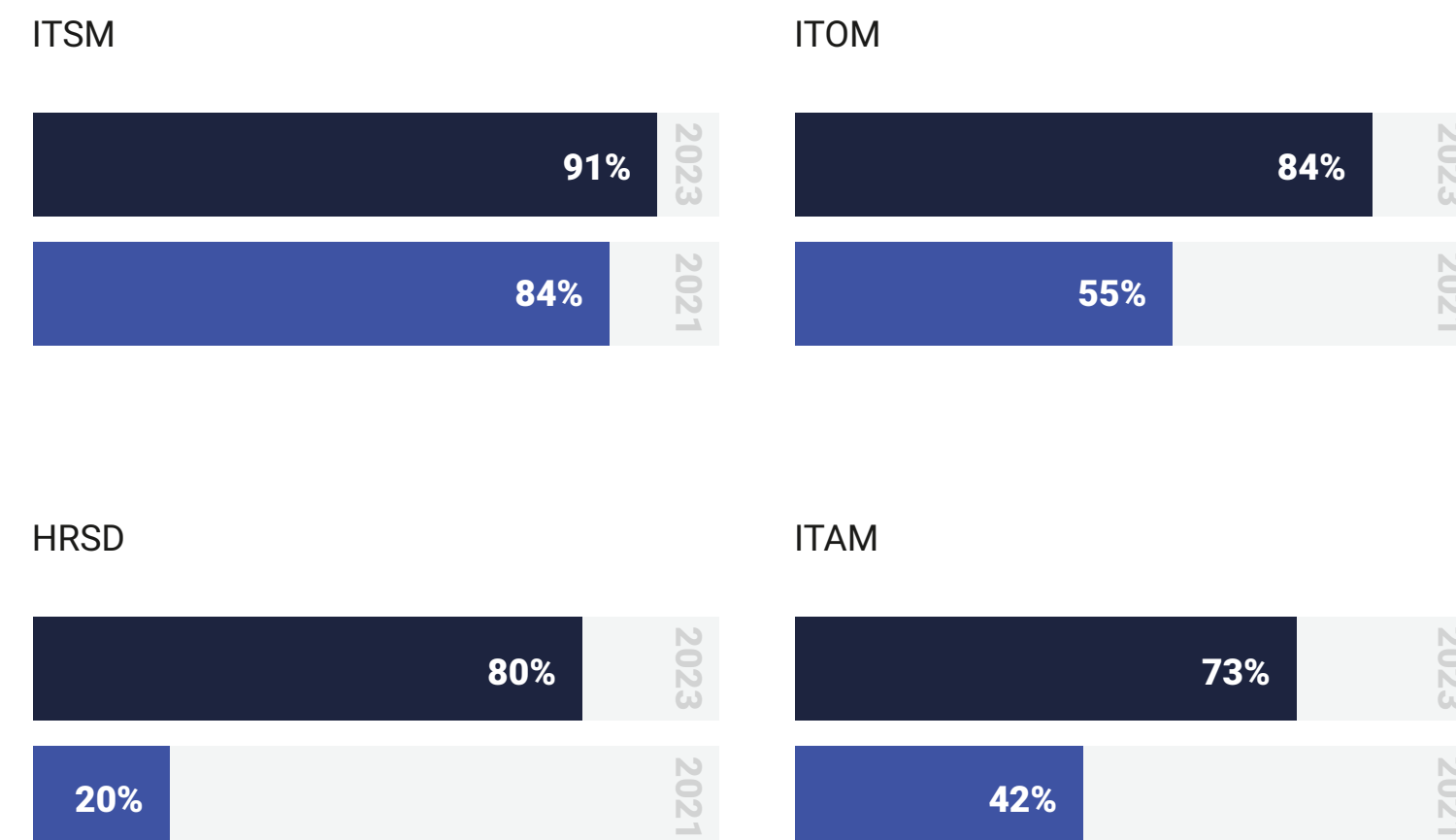
A notable ServiceNow capability is in how the platform can help better connect and integrate back-office and front-office operations at a process and workflow level. This level of integration delivers new value for organizations. It improves customer experiences and outcomes, improves aggregation and use of business data, and delivers more efficient business operations. Helping businesses better aggregate, contextualize and manage security incidents and alerts generated via security tools is another important opportunity. It ties into the broader business objectives discussed earlier in this report. Unsurprisingly, ITSM is currently the most widely deployed ServiceNow platform capability. The 2023 deployment rate (91%) is slightly higher than that of 2021 (84%).

As was the case in 2021, IT operations management is currently the second most widely deployed ServiceNow capability (87%). Encouragingly, deployment of every other ServiceNow element is higher than it was in 2021. It shows that broader ServiceNow adoption, beyond the ITSM core, is happening at strong rates. This growth in adoption is especially clear in HR service delivery (HRSD) capabilities, which grew from 20% in 2021 to 80% in 2023. Deployment of HR service management capabilities is currently strongest among public sector organizations (86%).

Appeal is also high in industry specific ServiceNow solutions. Industry-specific use cases represent an important area of evolution for ServiceNow. The platform’s process automation and workflow digitization capabilities have value across a range of different

Which elements of the ServiceNow Platform does your company currently have deployed?

(RESPONDENTS REQUESTED TO SELECT ALL THAT APPLY)

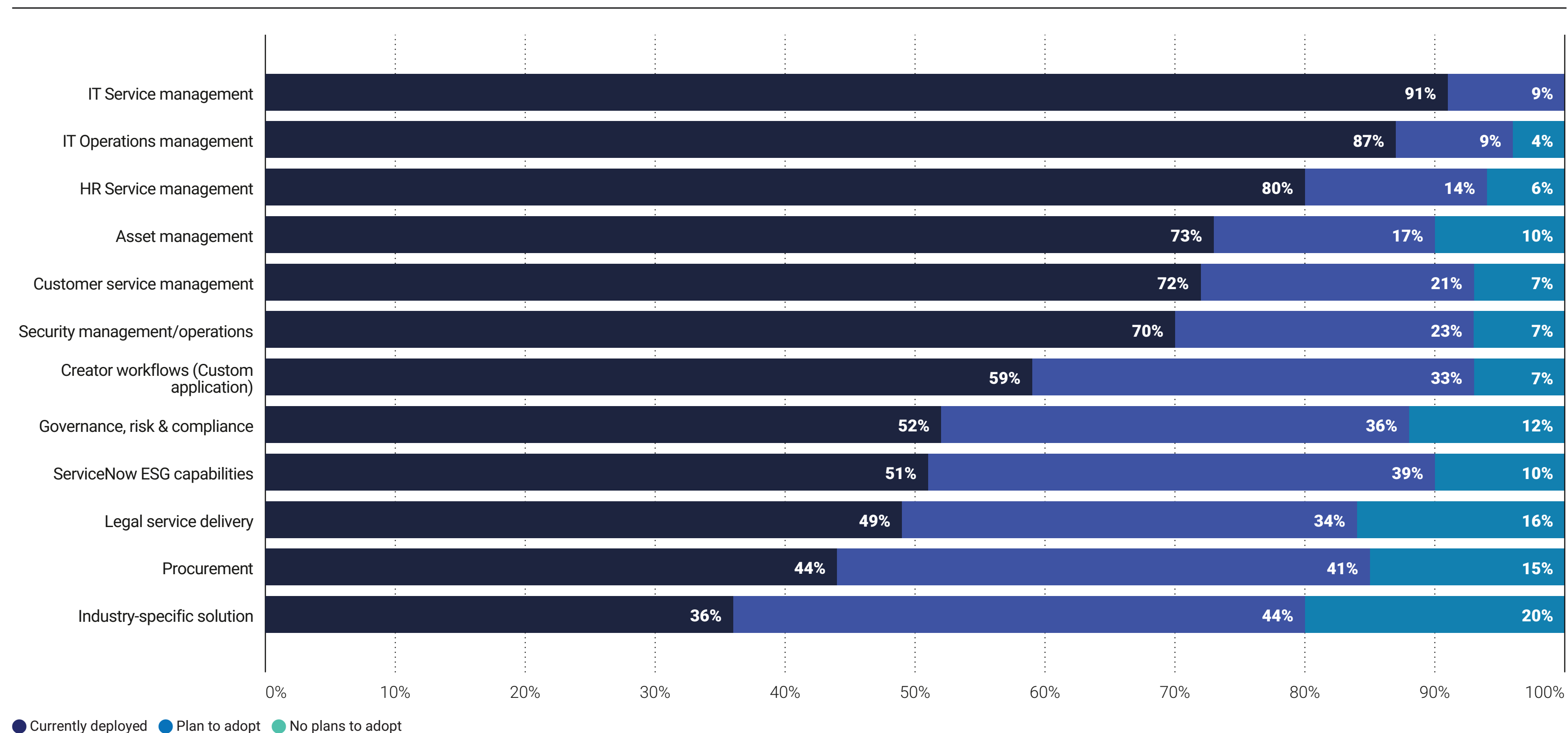


NOTE: N= 520 (2023) 317 (2021)
SOURCE: OMDIA

industries. They'll be of huge support to businesses looking to fast-track their digital transformation efforts. The value of industry specific solutions is in how they are tailored to the to the specific needs and objectives of businesses. This allows businesses to more easily understand how these tools can help in a familiar context. Regarding the ServiceNow capabilities respondents plan to adopt, industry-specific solutions carry strong interest, especially among healthcare businesses, where 48% are planning adoption.

Adoption plans for ServiceNow capabilities

(RESPONDENTS REQUESTED TO SELECT ONE ANSWER PER ROW)



NOTE: N=520 (2023), N=310 (2021)
SOURCE: OMDIA

Interesting industry-specific use-cases for the ServiceNow platform continue to emerge, many of which are formally supported with dedicated platform capabilities. If not already, businesses should explore these industry-specific capabilities in an effort to realize more value from adoption of the ServiceNow platform.

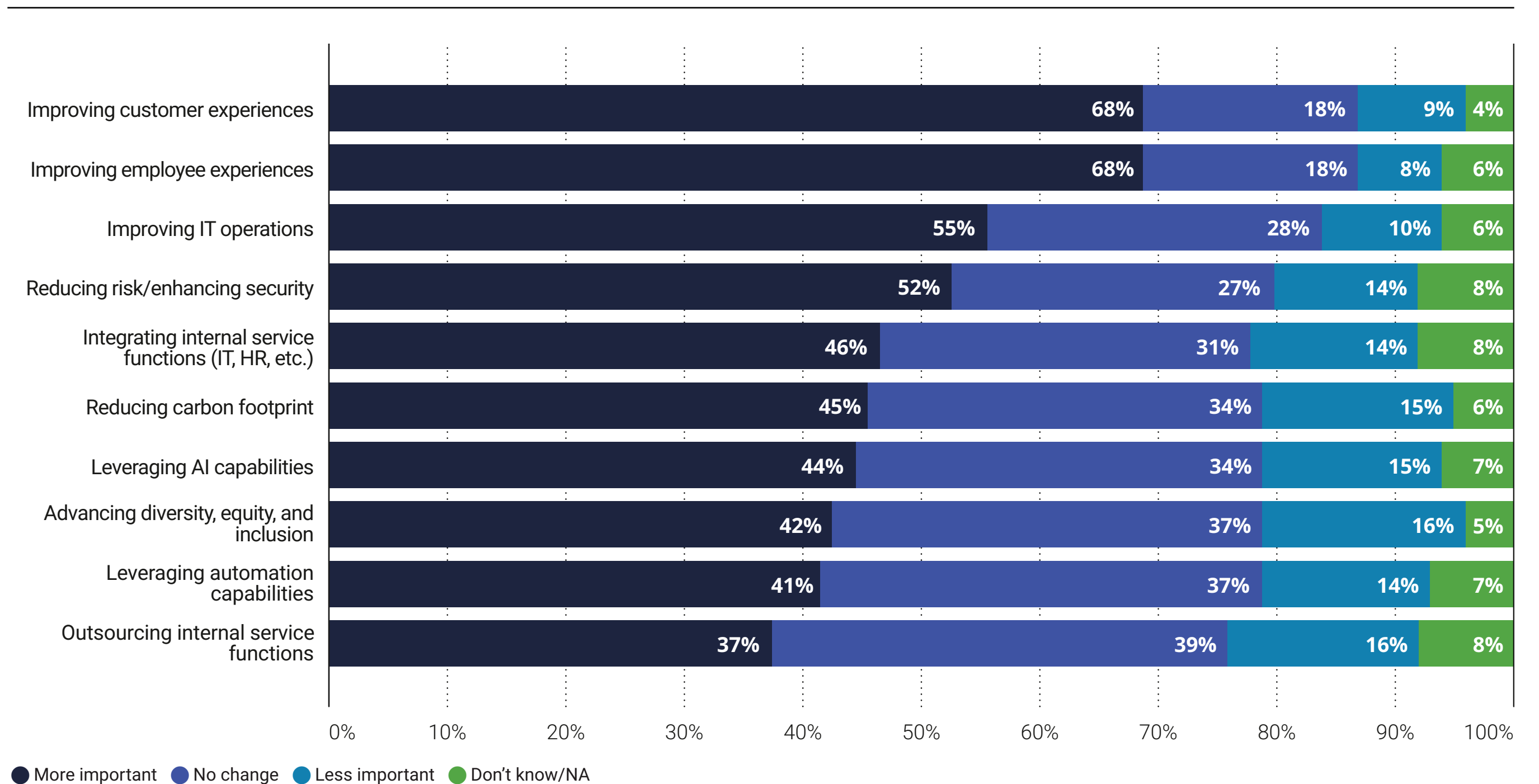
Improving the customer and employee experience are important strategic initiatives

Against a backdrop of changing employee and customer demands and behaviors is improving both the customer experience (CX) and employee experience (EX). These business objectives have become increasingly important over the past 18 months or so. With that in mind, it's little surprise to also see these areas increase in importance from a service management perspective.

The high-level of importance attached to improving CX and EX is consistent across all industries surveyed as part of this study. In 2021, many respondents also reported that CX (43%) and EX (48%) were areas of strategic importance that they were looking to improve with ServiceNow and service management practices. Businesses that focus on improving EX by better empowering and enabling staff also strengthen their capacity to deliver great CX. This focus is a core output and objective of a robust and mature, end-to-end service management approach, the likes of which ServiceNow helps deliver.

How has the importance of the following strategic initiatives changed in your organization over the past 12 months?

(RESPONDENTS REQUESTED TO SELECT ONE ANSWER PER ROW)



NOTE: N=520 (2023), N=310 (2021)
SOURCE: OMDIA

Businesses should leverage ServiceNow capabilities to help orchestrate new digital experiences for both employees and customers.

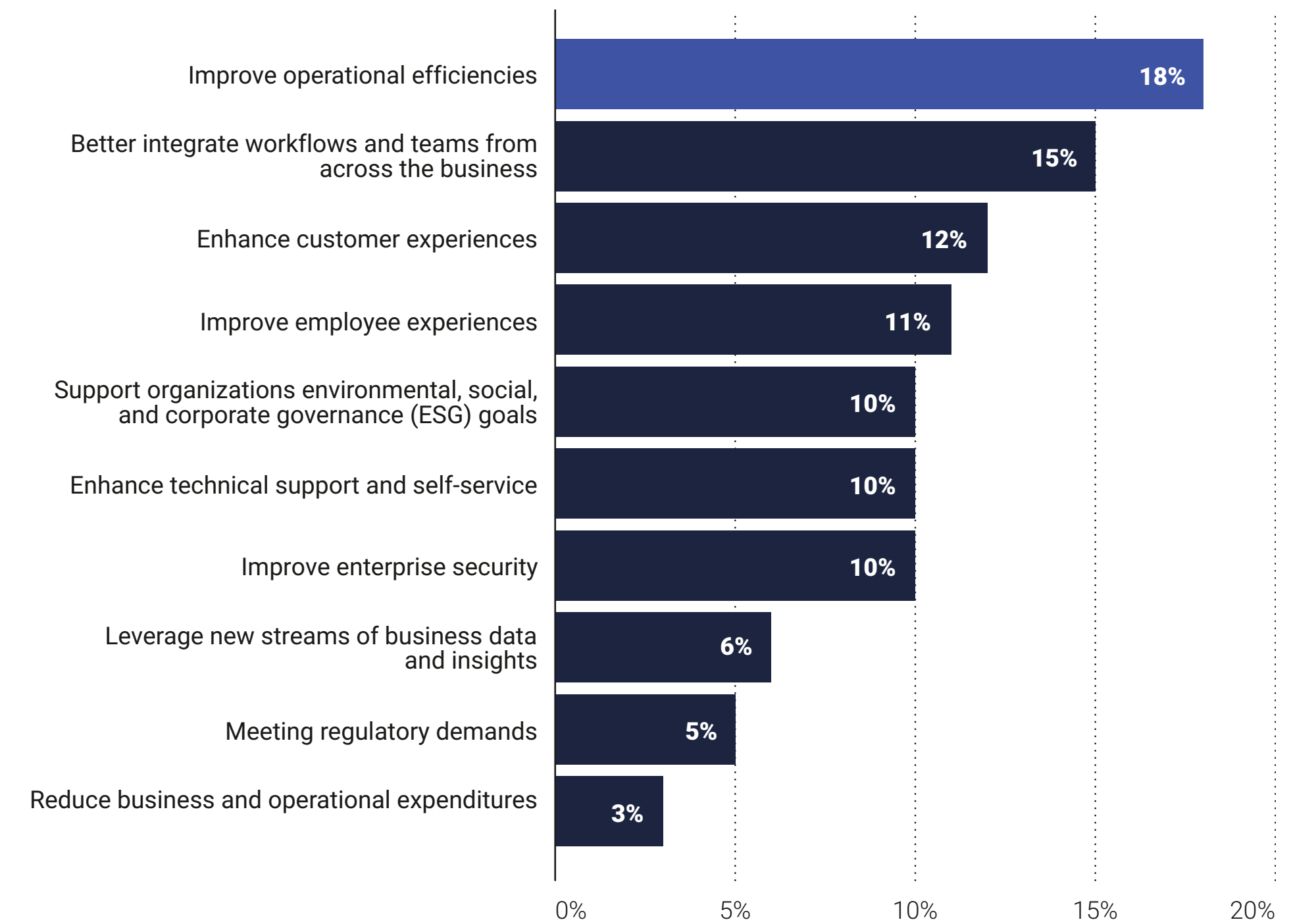
Businesses want service management to help improve operational efficiencies and businesses integration efforts

When exploring the specific service management priorities businesses are focused on, most say they're looking to improve operational efficiencies and integration across different business teams and workflows.


The strategic priority organizations attach to strengthening integration across different business units is encouraging, especially as this is a core enterprise service management (ESM) value. Enterprises must remember that any successful ESM initiative relies on more than technology. It is, however, an important element of any initiative. Businesses increasingly leverage technology to optimize, automate and better integrate the processes and workflows that guide how work gets done across different business units. Omdia defines ESM as the use of service management capabilities and practices within IT but also by other business functions, most notably HR, finance, facilities management and customer service teams.

Among the businesses that have used ServiceNow the longest (5 years or more), the 2023 survey shows that they also attach high strategic importance to how service management will support ESG business goals. There's some strategic priority variance with businesses across different industries. For example, manufacturing businesses prioritize CX enhancements over others, while healthcare and manufacturing attach the most importance to strengthening integration.

What is your organization's most important service management priority?




NOTE: N=520
SOURCE: OMDIA

 **Businesses should leverage ServiceNow to help better connect and integrate the processes and workflows that guide how people and teams work.**

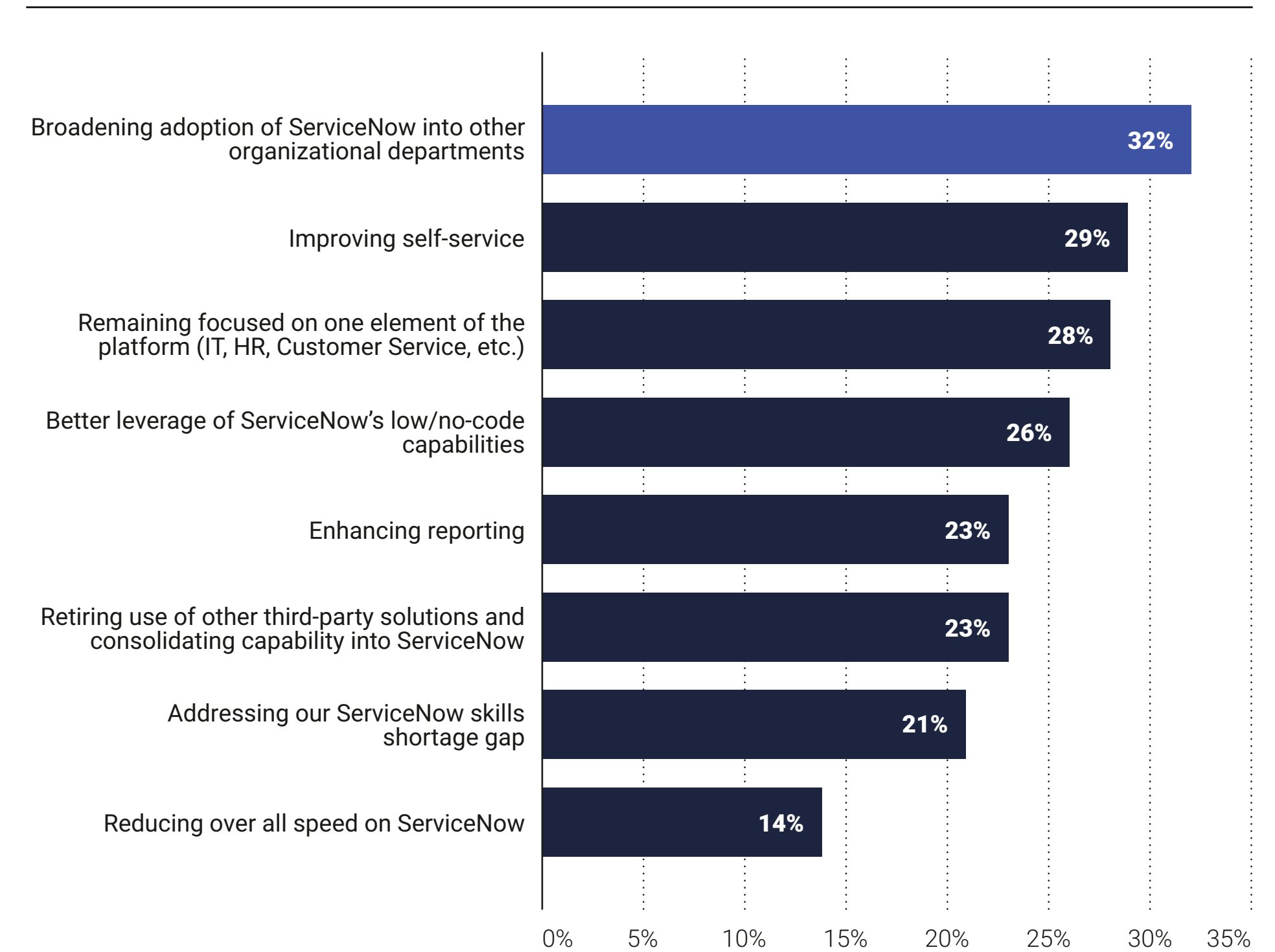
Organizations are looking for the ServiceNow Platform to support broader business goals

In alignment with the broader service management strategic objectives of better integrating different business units and workflows, organizations are prioritizing how they can extend ServiceNow capabilities into the wider business.

With employee support so closely linked to the broader employee experience, it's encouraging to see respondents identify self-service improvements as another important goal. As the world of work changes and becomes more flexible, businesses must evolve their support processes and self-service approaches. Doing so will help improve employee experiences and position businesses to better support more mobile-first workforces. Specifically, empowering employees with capabilities that help them better self-serve is an important opportunity. So too is providing self-heal and remediation features that help make processes such as incident management more proactive. Improving adoption of ServiceNow's low-code capabilities is another important goal, especially for system administrators. This capability is important to independent software vendors well invested in the ServiceNow Platform. It's also key for organizations that are looking to better democratize digital capabilities in empowering and enabling people to create new digital workflows and micro-apps.

 When exploring how to advance utilization of the ServiceNow platform, enhancing and automation employee support is often a good place to start.

What are your most important ServiceNow goals for the next 18 months?
(RESPONDENTS REQUESTED TO SELECT TOP 2 GOALS)

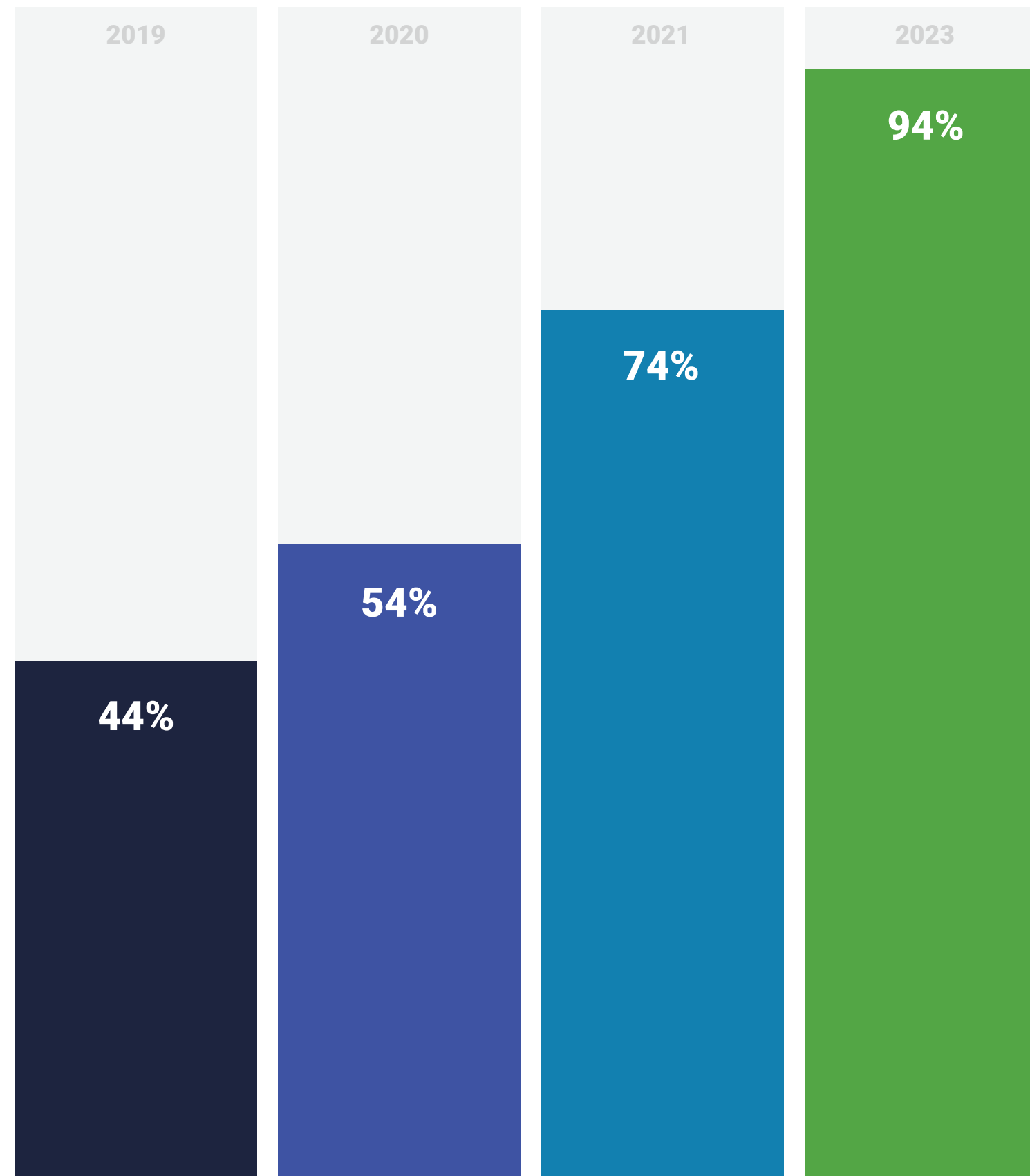


NOTE: N=520
SOURCE: OMDIA

Having a strategic roadmap for ServiceNow success will be important. Encouragingly, almost all respondents (94%) in 2023 say they have a strategic roadmap for ongoing use of ServiceNow. Within healthcare, 97% of respondents have a strategic roadmap. This result is an increase on the 74% that reported such a roadmap in 2021. Year-over-year, maturity here is increasing (54% had such a roadmap in 2020, and 44% in 2019).

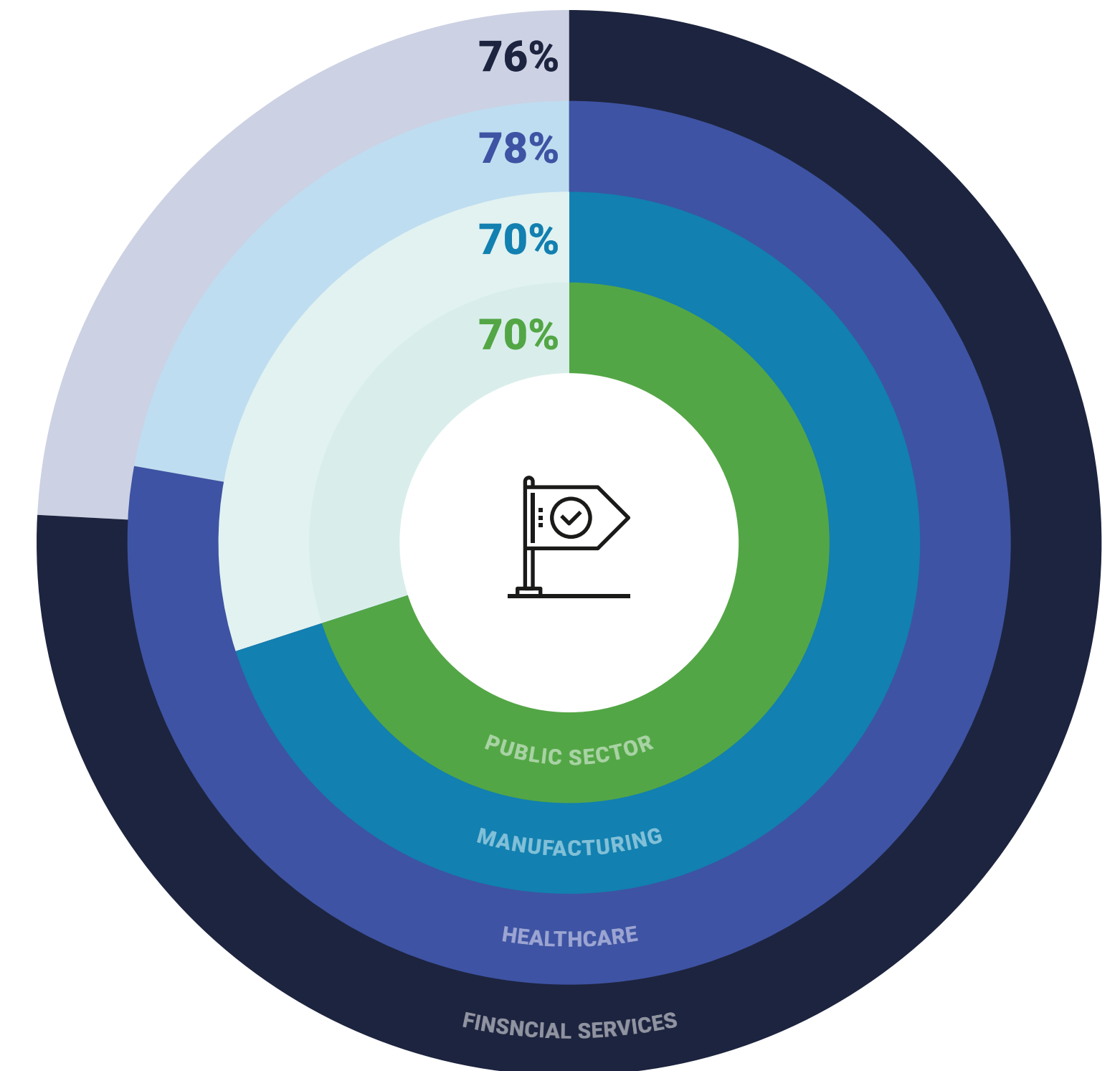
Among respondents, 74% advised that their ServiceNow roadmap had changed in the past year (compared to 52% in 2021). This result isn't surprising, given the accelerated rate of business change and the need for departments like IT to adapt strategies in response to these evolving business dynamics. Across all industries surveyed, about three-quarters of businesses report that their ServiceNow roadmap has changed this past year.

Do you have a ServiceNow Strategic Roadmap (a comprehensive roadmap that offers a vision for your overall ServiceNow Platform use) or a governance process?



SOURCE: OMDIA

Percentage of organizations that have initiated a change in their ServiceNow strategy or roadmap in the past year



NOTE: 98 (FINANCIAL SERVICES), 97 (HEALTHCARE), 103 (MANUFACTURING), 98 (PUBLIC SECTOR)
SOURCE: OMDIA

Key takeaway

Platform enhancements over recent years have turned ServiceNow into the engine room for digital transformation. The platform is helping businesses better automate, digitize processes, accelerate employee experiences, and advance workflows in line with the rapidly changing needs of modern organizations. Key to the broader business success of any ServiceNow initiative is for IT and digital leaders responsible for accelerating adoption of the platform to do so with the entire organization in mind. ServiceNow's capabilities have advanced to provide value well-beyond just the IT department, so those leading on any initiative should ensure that key stakeholders from other business units are engaged as part of any project.



Understanding service management success in times of great change is vital

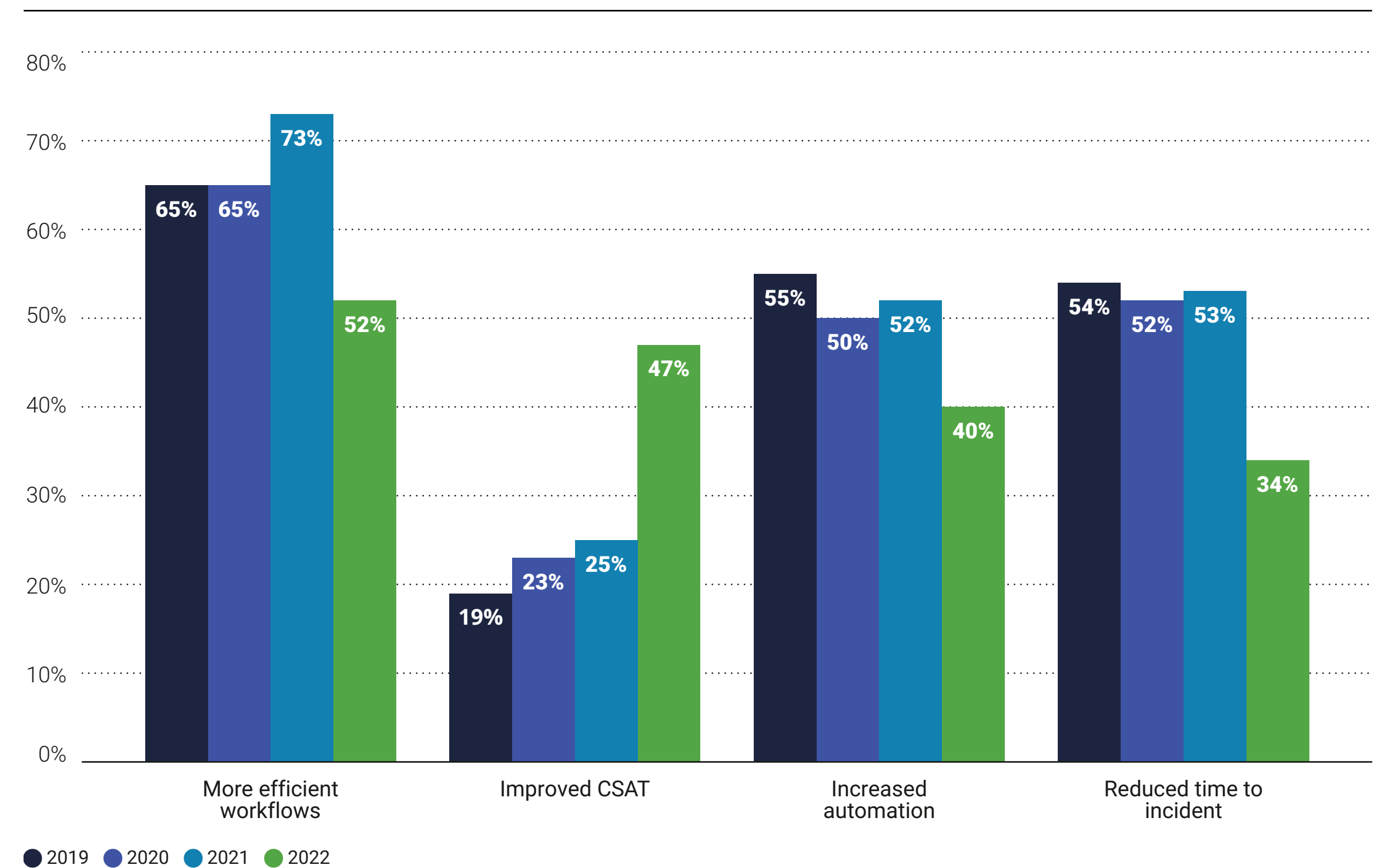
Organizations track ServiceNow success in different ways

It's clear from the insights in this report that businesses are making progress in defining strategic service management priorities and aspirations. Mechanisms to help understand successes and challenges are a vital part of any ServiceNow deployment initiative. Having these in place ensures organizations remain on the path to realizing value from any investment. Encouragingly, respondents report that ServiceNow is delivering against the key objectives of improving EX and CX. Here, 47% of respondents say customer satisfaction (CSAT) has improved – a significant increase from 2021 (25%) and 2020 (23%). As was the case in 2021, most respondents (52%) report more efficient workflows as the most common result achieved.

Just under half (45%) of respondents also say that since implementation, ServiceNow has helped improve employee satisfaction (ESAT). Developing a better understanding of how to measure and positively impact EX is a business-wide initiative. Functions such as IT, HR and facilities management all have an important role to play in it. It's encouraging to see that ServiceNow adoption has a tangible, positive impact on CSAT and ESAT, especially given the importance businesses attach to these areas.

What results has ServiceNow produced since it's been implemented?

(RESPONDENTS REQUESTED TO SELECT ALL THAT APPLY – SHOWING TOP 4 RESULTS OF A POSSIBLE 12)



NOTE: N=520 (2023), N=275 (2021), N=254 (2020), N=187 (2019)
SOURCE: OMDIA

Understanding how to measure success of any ServiceNow initiative is something businesses should do as part of the strategic planning process. Metrics that will be most impactful will be those that help build a picture around the business value delivered.

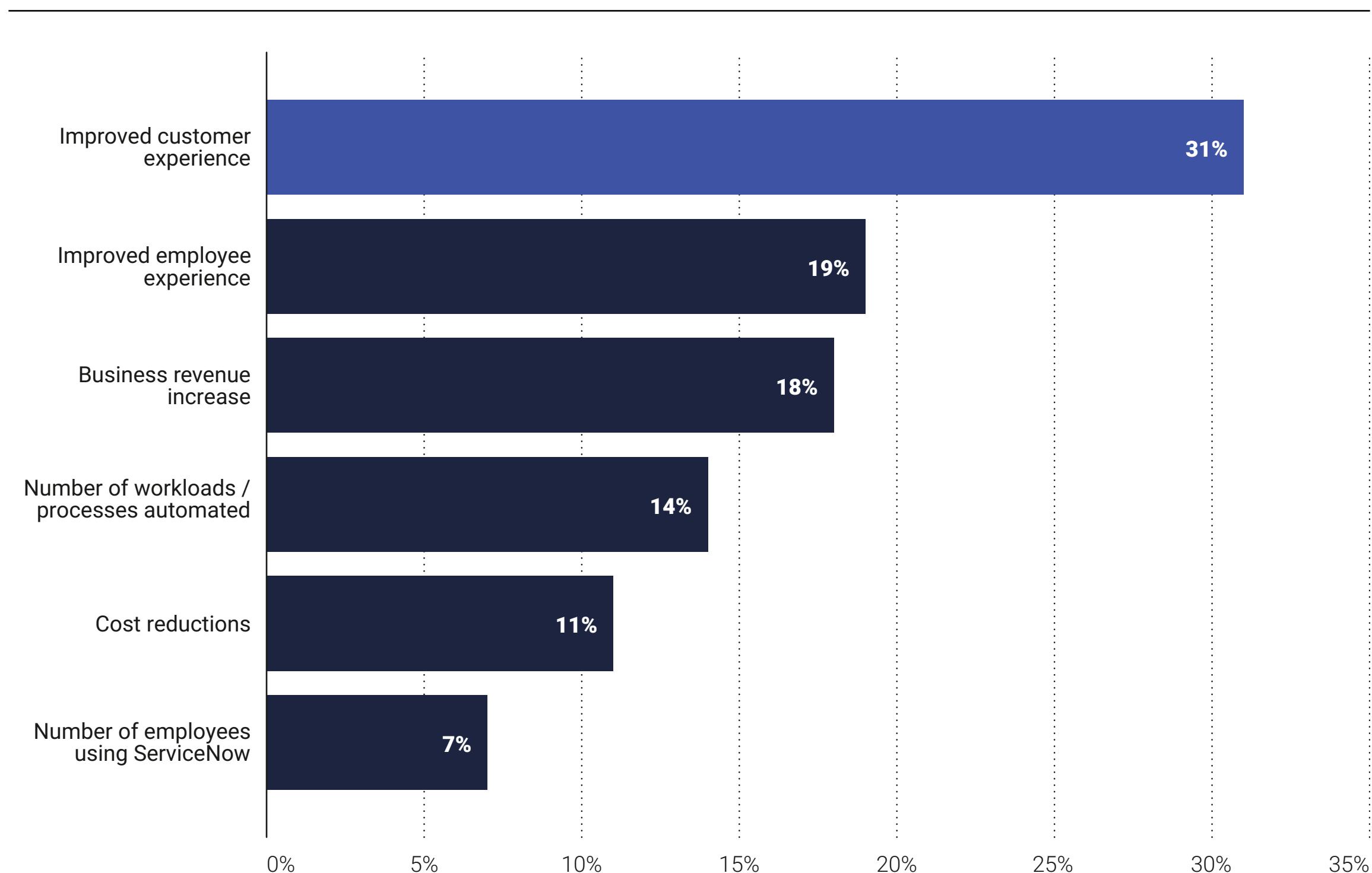
How effectively ServiceNow supports EX & CX improvements will continue to be an important measure of success

We've already seen how respondents identify improving EX and CX as an important strategic initiative for businesses. Organizations will also use improvements across these areas to determine success with the ServiceNow platform.

Increasing business revenues (23%) is more important to manufacturing firms than improving EX (18%). Determining success by tracking the number of employees using ServiceNow is the lowest ranked factor (7%) overall. Initially, this may seem concerning; however, it's more important for businesses to better understand value derived than usage statistics.

Businesses will rely on CSAT, workflow efficiency and ESAT key performance indicators (KPIs) in quantifying success. As improving CX is such an important objective, it makes sense that CSAT would be an important KPI for organizations to leverage as they track ServiceNow deployment success. The importance attached to CSAT and ESAT KPIs is much greater than it was in 2021.

What is the most important factor you use to determine success with your ServiceNow adoption?

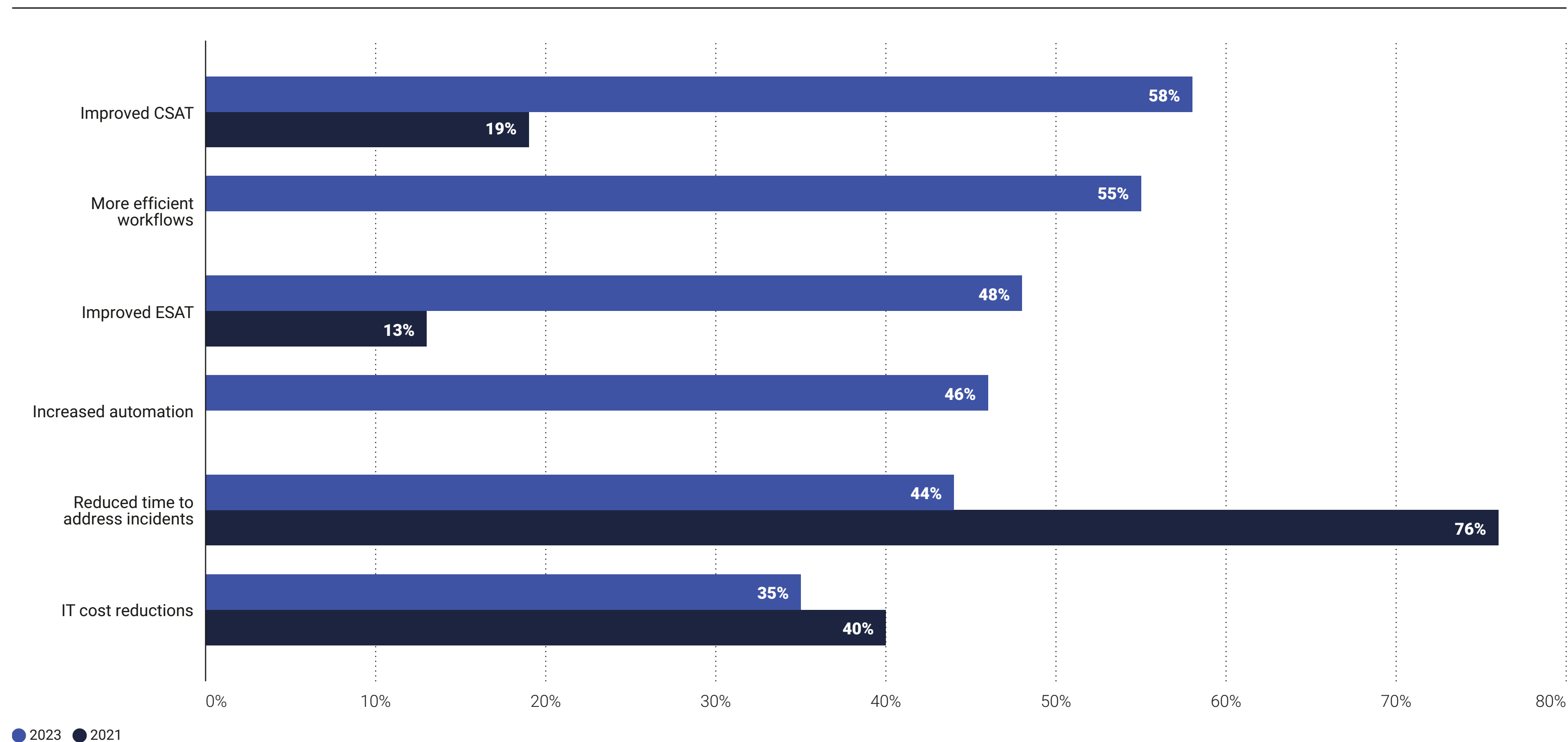


NOTE: N=520
SOURCE: OMDIA

Capabilities and practices that help businesses measure the efficiency of workflows will also be important going forward. Manufacturing firms will look to measure success based on increasing automation across processes and tasks. Reducing the time it takes to resolve an incident or request was the most widely adopted KPI in 2021. Although that's still important in the 2023 survey, other indicators are slightly more important.

What key performance indicators do you track to determine success?

(RESPONDENTS REQUESTED TO SELECT ALL THAT APPLY)



NOTE: N=520 (2023), N=310 (2021)
SOURCE: OMDIA



When building or implementing KPIs, ensure they help paint a picture of the business (not just IT) value derived from use of the ServiceNow platform.

Platform and integration complexities impact the success businesses achieve with ServiceNow

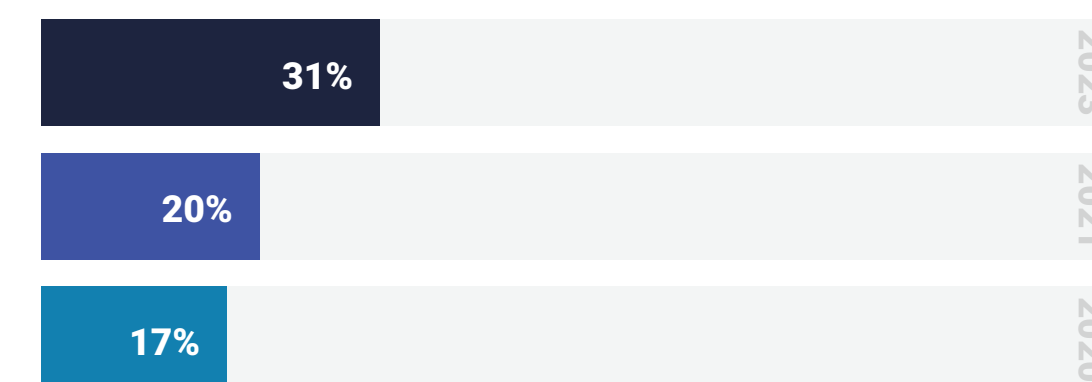
As this report shows, improving business and workflow integration is a strategic priority, but businesses are experiencing challenges here. Respondents highlight platform and integration complexities as the most challenging aspect of ServiceNow adoption. In 2020 and 2021, cost and technology implementation were the most significant challenges businesses faced. Both remain a challenge in 2023, but not as significantly as in previous years. As the use-cases and capabilities available via ServiceNow continue to expand, as do complexities around integration. Addressing this through services that aid adoption and ongoing utilization will be important for ServiceNow and its partners.

For businesses early on in their ServiceNow journey (3 years or less), respondents highlight technical issues experienced during adoption as a key challenge. It's the most dominant (55%) for those less than a year into adoption.

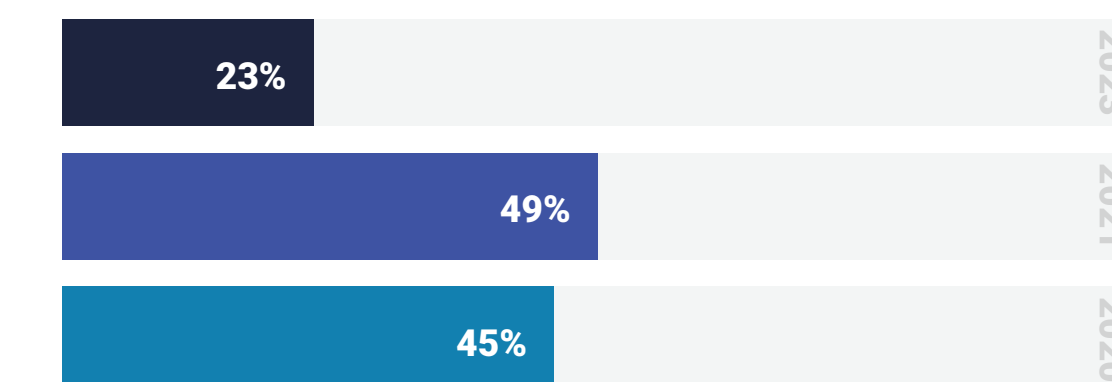
What are the most challenging aspects of your ServiceNow adoption?

(RESPONDENTS REQUESTED TO SELECT TOP 2 CHALLENGES)

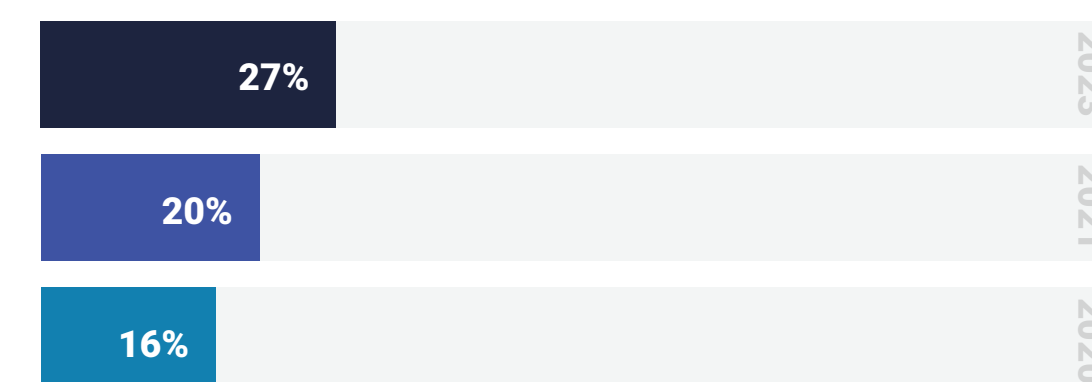
Integrations complexities



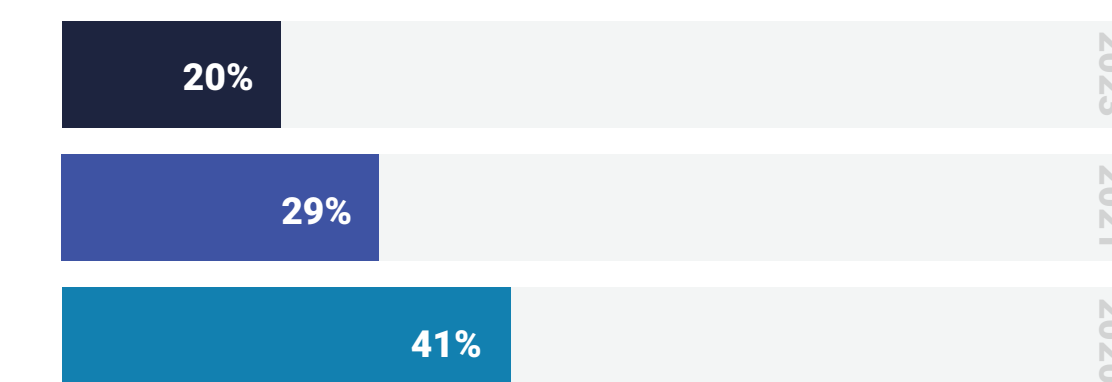
Cost of the technology



Technical challenges



Lack of experienced resources



● 2023 ● 2021 ● 2020

NOTE: N=520 (2023), N=321 (2021), N=262 (2020)

SOURCE: OMDIA

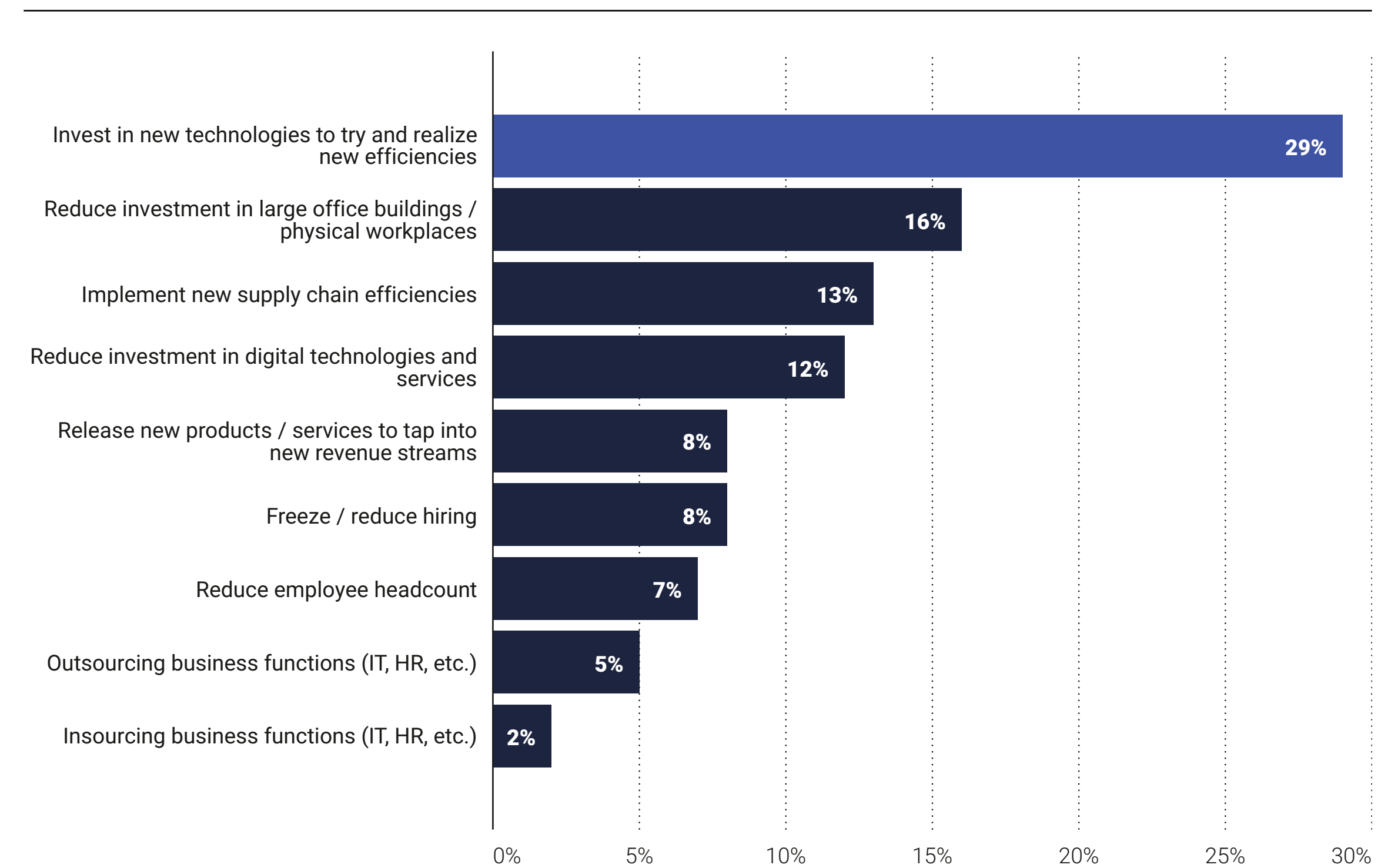
➔ Take the time to understand the challenges you may have experienced and work with a proven ServiceNow partner to help you overcome them. Your businesses challenges and identified opportunities should be the mutual interest in any partnership.

Businesses look to navigate economic headwinds by investing in new digital capabilities

Consistent across all industries is a plan to invest in new technologies. It'll help organizations realize new business efficiencies as a primary measure for overcoming the challenges of potential economic headwinds.

It's encouraging that businesses view investing in new technologies and rationalizing legacy solutions as an important measure. This approach can help organizations reduce costs and realize new efficiencies over the long term. It also points to an important role for the IT department; specifically, supporting business units in delivering against this objective. Being more proactive will be key. Encouragingly, 64% of respondents say the budget for digital initiatives has increased for 2023/2024 compared to the previous year.

What is the main measure your organization will take to deal with potential financial and economic pressures?



NOTE: N=520
SOURCE: OMDIA

➔ Investigate how ServiceNow capabilities can be adopted to modernize your digital infrastructure by replacing legacy applications that may be costly and under-utilized.

Key takeaway

People, process, platforms and partners are all vital pieces of the service management puzzle.

The operational and people-focused changes experienced in the workplace over recent years have undoubtedly increased the importance and relevance of service management practices and technologies. ServiceNow's success is evidence of this movement. Organizations better understand the platform's value and adoption has moved beyond the IT department to support broader business goals. We anticipate this success to continue going forward, especially as businesses look for platforms that support initiatives like ESG, enhancing digital experiences, and digitizing and improving operations with advanced AI and automation.

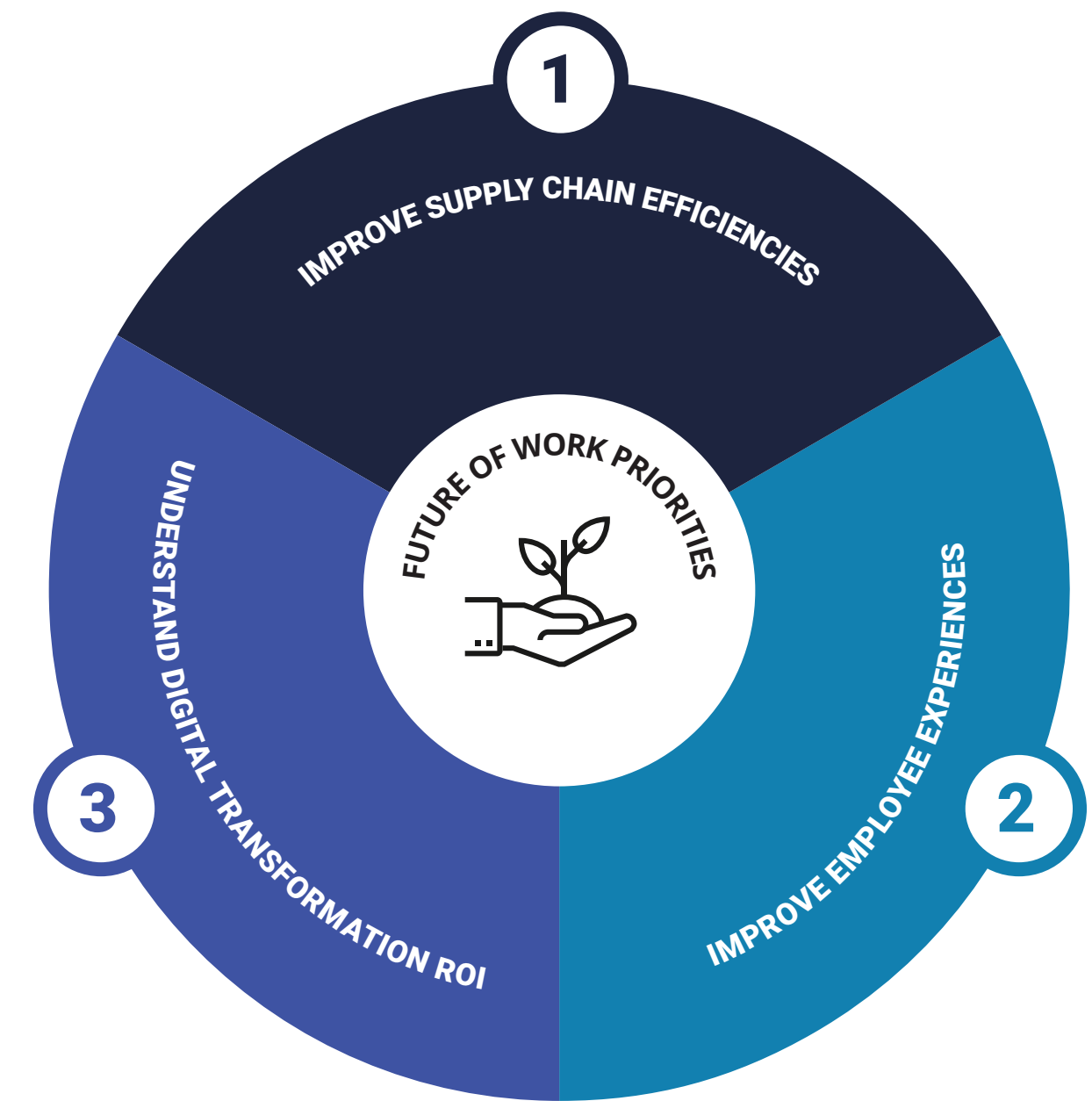
Service management has emerged as an important future of work competency.

Like digital transformation, talk about the future of work has intensified over recent years. However, understanding what exactly the future of work is and where businesses should focus can be challenging. In our 2023 survey, we asked respondents what their future of work business priorities were to bring some clarity to this important topic. Encouragingly, their top three priorities can all be supported and enhanced with service management capabilities.

Defining future of work objectives is important. It helps businesses understand how they can apply service management capabilities in a tactical fashion going forward. One key objective in any service management initiative should be to increase the adoption of any platform throughout the broader business. Being aware of future of work aspirations will be important in mapping capabilities to compelling digital outcomes.

What are the most important future of work priorities you feel ServiceNow will support over the next 18 months?

(RESPONDENTS REQUESTED TO SELECT TOP 2 PRIORITIES – SHOWING TOP 3 OF 12)



NOTE: N= 520
SOURCE: OMDIA

Businesses need strategic support from ServiceNow implementation partners.

Partners have long been important in helping businesses realize maximum value from any ServiceNow investment and implementation. As ServiceNow continues to evolve into a broader enterprise platform, partner support and enablement will be even more important. Enterprises largely work with managed service providers or service integrators, or directly with ServiceNow, to support platform implementation. However, 75% of respondents to this year’s survey say they’re evaluating the relationship with their current ServiceNow partner. Businesses are reconsidering these relationships for various reasons.

Partner financial, ESG concerns and inflexible contract arrangements are the main reasons respondents are evaluating their current ServiceNow partnership arrangements.

ESG is a particularly interesting factor. It shows that the area is proving to be not only an important internal business agenda item but also a key factor when organizations select digital partners. Strength of professional services and strength of managed services are the partner capabilities businesses look for when selecting a ServiceNow partner. Proven cybersecurity focus and expertise is also important. Any long-term strategic partnership must hold the organization’s goals and objectives as the common interest.

What is the priority factor causing your organization to evaluate its existing ServiceNow service-provider relationship?

- 1



Concerns over partners enviromental, social, and corporate governance (ESG)

- 2



Concerns about partners long-term financial stability

- 3



Inflexible contract arrangements

NOTE: N= 520 (showing top 3 responses)
SOURCE: OMDIA

Appendix

About

NTT DATA

NTT DATA is a \$30 billion trusted global innovator of IT and business services. We help clients transform through business and technology consulting, industry and digital solutions, applications development and management, managed edge-to-cloud infrastructure services, BPO, systems integration and global data centers. We are committed to our clients' long-term success and combine global reach with local client service in over 80 countries. Visit nttdata.com or [LinkedIn](#) to learn more.

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Omdia

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired IHS Markit technology research portfolio*.

We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses – today and tomorrow.

*The majority of IHS Markit technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.

Demographics and methodology

The 2023 ServiceNow Insights and Vision survey was a joint research study between NTT DATA and Omdia. We collated responses from participants across organizations headquartered in Canada or the United States and across 10 different business departments, including IT, HR, finance, marketing, facilities management and customer service. Respondents' roles include directors, managers and C-level executives.

Respondents all worked for organizations that use ServiceNow in some capacity, and spanned industries including manufacturing, healthcare, public sector and financial services.

RESPONDENT ROLES AND DEPARTMENT BREAKDOWNS

DEPARTMENT	RESPONDENT (%)	ROLE	RESPONDENT (%)
IT	22%	Director	26%
Operations	18%	Manager	21%
Finance	13%	Vice president / SVP	16%
Security	8%	C-level	11%
Customer services	8%	System admin	9%
Executive management	7%	Technical consultant	7%
Marketing	7%	Developer / engineer	5%
Facilities management	6%	Architect	5%
Human resources	6%		
Procurement	5%		

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