

Phase 2: Project Planning Phase

Project Title: Laptop Request Catalogue Item

Platform: ServiceNow – SmartInternz Project

1. Introduction to the Project Planning Phase

The Project Planning Phase is the backbone of successful project execution. After finalizing the idea during the Ideation Phase, this stage focuses on outlining how the project will be executed — what tasks need to be done, in what order, who will perform them, what tools are required, and when each task will be completed.

In this project, the objective is to develop a Laptop Request Catalogue Item in ServiceNow that automates laptop requests, approvals, and fulfillment workflows. Proper planning ensures that all configurations, testing, and documentation are done systematically and efficiently.

The planning phase acts as a roadmap, ensuring clarity for every stakeholder involved and minimizing risks during development.

2. Project Scope

The scope defines what is included in the project and what is not.

In Scope:

Creation of a new Service Catalog item named Laptop Request.

Design of a user form with necessary fields (e.g., laptop type, justification, delivery location).

Implementation of an automated workflow using Flow Designer.

Setting up approval stages (Manager → IT Support → Closure).

Email notifications for each stage.

Testing the form, workflow, and notifications.

Out of Scope:

Integration with external inventory management systems.

Hardware delivery tracking outside ServiceNow.

Development of mobile apps for the catalogue item.

Defining this scope ensures the project stays focused on its achievable and measurable goals.

3. Objectives of the Planning Phase

To define milestones, deliverables, and timelines.

To allocate resources efficiently and identify dependencies.

To minimize project risks and ensure smooth execution.

To design a workflow that meets user and business requirements.

To ensure ServiceNow best practices are followed.

4. Task Breakdown and Timeline

Below is the Work Breakdown Structure (WBS) outlining all major activities in the project, along with estimated timelines:

Task No.	Task Description	Tool / Module	Responsible Role	Timeline
1	Requirement gathering and documentation Student Developer		Docs / Google Sheets	1 day
2	Create Service Catalog item (Laptop Request) 2 days	Service Catalog	Developer	
3	Add form fields (Laptop type, justification, etc.) 1 day	Service Catalog	Developer	
4	Create Approval Workflow	Flow Designer	Developer	2 days
5	Configure Notifications and Tasks	Flow Designer	Developer	1 day
6	Perform Testing and Validation	Test Instance	Tester	2 days
7	Prepare Final Documentation	Docs / PDF	Student Developer	1 day

Total Duration: ~10 days (ideal for SmartInternz internship timeline)

5. Resource Planning

Human Resources:

Student Developer: Configures the ServiceNow item and workflows.

Project Mentor / Faculty Guide: Provides guidance and reviews progress.

Testers / Peers: Help validate workflow and usability.

Technical Resources:

ServiceNow Developer Instance

Flow Designer Module

Notification Configuration Tool

Approval Engine

Knowledge Base (for documentation)

6. Risk Analysis and Mitigation

Potential Risk Impact	Mitigation Strategy
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Workflow not triggering properly before testing.	High	Verify Flow Designer conditions and triggers
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Approval emails not delivered	Medium	Check notification settings and SMTP configuration.
Wrong field mapping in form	Medium	Conduct step-by-step validation before deployment.
Data loss due to testing	Low	Take a backup of records before making changes.

By identifying risks early, the project ensures fewer issues during the later development and testing stages.

7. Workflow Planning

A Laptop Request Workflow typically involves the following stages:

1. Request Submission: User fills out the form and submits it.
2. Manager Approval: The request is sent to the reporting manager.
3. IT Fulfillment: Upon approval, the IT department assigns a laptop.
4. Request Closure: Once delivered, the request status changes to “Closed.”
5. Notification: Automatic emails are sent at each stage to keep users informed.

This workflow ensures an organized, transparent process that aligns with IT service management principles.

8. Communication Plan

Clear communication is essential to project success. The communication plan outlines how updates, feedback, and progress reports will be shared.

Communication Type	Medium	Frequency	Participants
Progress Updates	SmartInternz Dashboard / Email	Daily	Student, Mentor
Issue Discussion	Online Meetings / Chat	As needed	Developer, Mentor
Documentation Sharing	Google Drive / Docs	Weekly	Developer, Guide
Testing Reports	Screenshots / Reports	End of Testing	Tester, Mentor

9. Quality Assurance Planning

To ensure quality, the following checks will be applied:

All catalog fields must be validated (no blank or incorrect data).

The workflow must function without manual intervention.

Notifications must reach the correct users.

The user interface must be clear and responsive.

ServiceNow's test instance will be used to simulate real-world scenarios before deployment.

10. Expected Outcomes

At the end of this phase, the following should be achieved:

A clear action plan for all project tasks.

Defined workflow design and approval logic.

Assigned responsibilities and deadlines.

Risk and communication management strategies.

These outcomes ensure that the next phase — Project Design — can proceed efficiently with minimal confusion.

11. Conclusion of Project Planning Phase

The Project Planning Phase transforms the idea into a practical, executable plan. It ensures all tasks are well-organized, risks are considered, and resources are allocated efficiently.

For the Laptop Request Catalogue Item Project, this phase provides a detailed roadmap for development in ServiceNow, ensuring that the catalog form, workflow, and approval mechanisms are delivered on time and meet all functional requirements.

The success of the project depends heavily on this planning foundation — once completed, the team is ready to proceed with the Project Design Phase, where the visual structure, catalog form, and workflow diagrams are built and refined.