**Project Document: Educational Organization Using ServiceNow**

**1. Project Overview**

* **Project Title:** Educational Organization Using ServiceNow
* **Date:** September 01, 2025
* **Team Members:**

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* **1.1. Executive Summary**

This document outlines the plan for implementing the ServiceNow platform within [Educational Organization Name]. The primary goal is to leverage ServiceNow to streamline key business processes, improve operational efficiency, and enhance the experience for students, faculty, and staff. This project will initially focus on implementing core modules to address critical pain points in IT Service Management (ITSM), Student Services, and Facilities Management. The implementation will be phased, with the initial phase targeting the most impactful areas.

**1.2. Project Goals and Objectives**

* **Overall Goal:** To modernize and integrate key administrative and student-facing services using a unified platform.
* **Specific Objectives:**
  + Improve IT support efficiency by centralizing service requests and incident management.
  + Enhance the student experience by providing a single portal for requesting services (e.g., transcripts, academic advising, financial aid).
  + Automate manual processes within Student Services and Admissions.
  + Increase visibility and accountability for facility maintenance requests.
  + Provide self-service capabilities for students and staff to find information and resolve common issues.
  + Establish a foundation for future expansion into other ServiceNow modules (e.g., HR Service Delivery, GRC).

**1.3. Scope**

* **In-Scope:**
  + **IT Service Management (ITSM):**
    - Incident Management
    - Problem Management
    - Change Management
    - Service Catalog (initial set of IT services)
    - Knowledge Management
    - Service Portal for IT support
  + **Student Services:**
    - Case Management for student inquiries (e.g., transcripts, enrollment verification, financial aid questions).
    - Student-facing Service Catalog for common requests.
    - Knowledge Base for FAQs related to student life.
  + **Facilities Management:**
    - Work Order Management for facilities requests (e.g., broken furniture, room booking, maintenance).
    - Simple Service Catalog for submitting facilities requests.
  + **Custom Integrations:**
    - Integration with existing identity management system (e.g., Active Directory/LDAP) for user provisioning.
    - Data import of student and faculty records from a [specify system, e.g., SIS, ERP].
* **Out-of-Scope:**
  + HR Service Delivery (HRSD)
  + Financial Management
  + Project Portfolio Management (PPM)
  + Customer Service Management (CSM) for external customers/alumni
  + Advanced integrations with all legacy systems beyond what is specified.
  + Custom application development not directly related to the initial scope.

**2. Project Plan & Phasing**

**2.1. Project Methodology**

This project will follow an Agile/Scrum-based methodology, allowing for iterative development and frequent stakeholder feedback. The project will be broken down into phases and sprints.

**2.2. Project Phases**

* **Phase 1: Foundation & ITSM Implementation (Duration: [e.g., 8-10 weeks])**
  + **Activities:**
    - Kick-off Meeting and Project Team Formation.
    - Requirements Gathering and Workshops for ITSM.
    - Instance setup and initial configuration (user roles, groups, basic branding).
    - Incident, Problem, and Change Management module configuration.
    - Development of initial IT Service Catalog and Knowledge Base.
    - User Acceptance Testing (UAT) for ITSM.
    - Training for IT staff.
    - Go-Live of ITSM for the IT department.
* **Phase 2: Student Services & Facilities Management Rollout (Duration: [e.g., 6-8 weeks])**
  + **Activities:**
    - Requirements Gathering for Student Services and Facilities.
    - Configuration of Case Management for Student Services.
    - Development of a student-facing Service Catalog.
    - Configuration of Work Order Management for Facilities.
    - UAT for Student Services and Facilities.
    - Training for Student Services and Facilities staff.
    - Training for faculty and staff on the new Service Portal.
    - Go-Live for Student Services and Facilities.
* **Phase 3: Optimization & Post-Go-Live Support (Duration: [e.g., 4 weeks and ongoing])**
  + **Activities:**
    - Post-implementation review and feedback collection.
    - Bug fixing and performance tuning.
    - Ongoing training and support for end-users.
    - Planning for future phases and module expansions.

**3. Roles and Responsibilities**

* **ServiceNow Lead Developer/Architect:** - Responsible for technical design, development, and overall platform architecture.
* **Business Analyst**- Gathers and documents business requirements, translates them into functional specifications.
* **UAT Testers:** A group of key users from each department who will test the solution.

**4. Communication Plan**

* **Weekly Status Meetings:** Held with the core project team to review progress, risks, and next steps.
* **Bi-Weekly Steering Committee Meetings:** With key stakeholders and the Project Sponsor to provide high-level updates and address strategic issues.
* **Regular Email Updates:** Sent to all stakeholders to communicate key milestones and project progress.
* **Project Portal:** A central repository (e.g., SharePoint, Teams, or a ServiceNow project space) for all project documents, meeting minutes, and status reports.

**5. Risk Management**

* **Risk:** Scope creep.
* **Mitigation:** A formal change control process will be implemented. Any new requirements will be assessed for their impact on the project timeline and budget and will require approval from the Project Sponsor.
* **Risk:** Low user adoption.
* **Mitigation:** A comprehensive change management plan, including early engagement of key users, targeted training, and clear communication of benefits.
* **Risk:** Data migration issues.
* **Mitigation:** A thorough data discovery and cleansing process will be conducted. Small-scale data imports will be tested in development and test environments before a final production import.
* **Risk:** Lack of required resources or skills.
* **Mitigation:** Ensure key roles are filled and that the team receives the necessary training. If an external partner is used, their roles and responsibilities must be clearly defined.

**7. Success Metrics**

* **ITSM:**
  + Reduction in average time to resolve IT incidents by [e.g., 20%].
  + Increase in Service Catalog usage for IT requests by [e.g., 50%].
  + High user satisfaction score from IT staff and end-users.
* **Student Services:**
  + Reduction in manual email/phone inquiries by [e.g., 30%].
  + Increase in student self-service portal usage by [e.g., 40%].
  + Positive feedback from students and staff.
* **Facilities:**
  + Faster turnaround time for work orders.
  + Improved visibility into the status of facilities requests.