

Project Planning Phase Document

Date	2 November 2025
Team ID	NM2025TMID04318
Project Name	Educational Organisation using Service Now

1. Introduction

The Project Planning Phase for the ServiceNow implementation project was initiated on October 22, 2025. During this phase, the project team established the objectives, scope, resources, schedule, and risk management plan required for the successful development of the ServiceNow platform for the educational organization. The planning phase served as the foundation for all subsequent stages and ensured that the project was aligned with the institution's needs and goals.

2. Project Objectives

The primary objectives defined during the planning phase were as follows:

- To automate service request and approval workflows across academic and administrative departments.
- To provide a centralized Service Portal for students, faculty, and staff.
- To improve service efficiency and reduce manual processes.
- To enable tracking, reporting, and management of all service-related activities.
- To enhance the user experience through a structured and intuitive portal interface.

3. Project Scope

The scope finalized during the planning phase included:

- Designing and developing a **Service Portal** for different user roles (students, faculty, and administrators).
- Configuring key ServiceNow modules such as **Incident Management**, **Change Management**, and **Service Catalog**.
- Creating customized **catalog items** like *Transcript Request*, *Password Reset*, and *Facility Booking*.
- Establishing **approval workflows** and **automated email notifications**.
- Integrating the system with existing institutional databases, where applicable.
- Preparing documentation and conducting end-user training sessions.

4. Planning Activities

The following major activities were carried out during the planning stage:

Activity	Description	Outcome
Requirement Gathering	Conducted meetings with stakeholders to identify system requirements.	Requirement Specification Document
Scope Definition	Finalized the project boundaries, features, and workflows.	Approved Scope Document
Timeline and Scheduling	Created a detailed project timeline outlining weekly milestones.	Project Schedule
Resource Allocation	Assigned specific roles to team members.	Resource Plan
Environment Setup	Set up the ServiceNow Developer Instance for configuration.	Configured Development Environment

5. Project Deliverables

At the end of the planning phase, the following deliverables were completed:

- Finalized requirement and scope documents.
- Approved project plan and schedule.
- Defined team roles and responsibilities.
- Identified risks and mitigation measures.
- Configured ServiceNow environment for the design phase.

6. Outcome of the Planning Phase

The planning phase provided a clear understanding of the project's objectives, functional requirements, and execution strategy. With a well-defined roadmap and structured approach, the project team was able to successfully design, configure, and implement the ServiceNow solution for the educational organization.