



Statement of Services
ServiceNow Managed Services

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Introduction

CDI's Managed Services for ServiceNow are designed to provide Clients with a comprehensive suite of 24 x 7 platform availability monitoring, platform maintenance, administration, and support as well as ongoing platform enhancements and evolution.

1. Service Offerings

CORE: The CORE managed services package for ServiceNow Enterprise will help ensure your instance is online, up to date with the latest features and security patches, and in alignment with ServiceNow technical best practices. The offering is designed to provide ServiceNow Enterprise customers with a packaged solution that will take the burden of platform upgrades, security patches, and maintenance off their hands.

ADVANCED: The ADVANCED managed services package for ServiceNow Enterprise, includes all CORE offerings, and will help your company achieve success using ServiceNow. This offering is designed to provide ServiceNow customers with resources available for virtual administration and technical support services via an on-demand reactive basis. Our team of virtual administrators will assist with minor enhancements and workflow configurations to the system and provide technical support with end to end case management for any issues. This package is designed for clients that want an hours-based approach to supplement their internal teams, with basic defect handling, administration, and minor enhancement assistance.

NEXTGEN: The NEXTGEN managed services package for ServiceNow was designed to help drive the continuous evolution of your ServiceNow Enterprise platform. In addition to day-to-day support of your existing production configuration, the offering provides a combination of dedicated roles required to enhance and evolve your ServiceNow platform. The roles include Product Owner, Project Manager, Architect, Business Analyst, Administrator/Reporting Specialist, Developer and CMDB Health Specialist. This package is intended for organizations that do not want to hire and manage the entire breadth of staff required internally to continuously enhance and evolve the ServiceNow platform. The value of this package is as much in driving the cadence and structure surrounding the evolution of the platform as much as it is in the actual development and deployment of ongoing enhancements. This is not an hourly based package and should not be viewed as such.

Services Offered	CORE	ADVANCED	NEXTGEN
Platform version upgrades	✓	✓	✓
Platform Quarterly Security patches	✓	✓	✓
Platform Quarterly Health Checks (preventative maintenance)	✓	✓	✓
Virtual administration services		✓	✓
7x24 ServiceDesk access for support including ServiceNow escalation		✓	✓
Minor Enhancements		✓	✓
Major Enhancements			✓
ServiceNow Role: Product Owner			✓
ServiceNow Role: Project Manager			✓
ServiceNow Role: Architect			✓
ServiceNow Role: Business Analyst			✓
ServiceNow Role: Developer			✓
ServiceNow Role: Administrator / Reporter			✓
ServiceNow Role: CMDB Health & Wellness			✓

Any items not explicitly covered within this document are considered out of scope. We will review new requests or questions received from customers and add clarifications or define the items explicitly in the SOS documents.

2. Scope of Services

This document specifies the scope and schedule of the services delivered within the **Managed Services** agreement.

2.1. Core

The included **CORE** services are described at a high level in the table below.

CORE Component	Description of Scope of Services
ServiceNow Platform Upgrades	1 instance upgrade per year per contracted instance
ServiceNow security patches	Deployment and testing of security patches, performed quarterly per contracted instance
ServiceNow Instance Reviews	Ensure your instance remains healthy and maintains seamless upgradeability

2.1.1. ServiceNow platform upgrades

For **CORE**, CDI will perform up to one ServiceNow platform upgrade per contracted instance per year. The following are some of the tasks and activities performed:

- Evaluate new release enhancements and changes, including deprecating of features, access impact of changes
- Determine impact of maintenance windows, plan and schedule upgrades accordingly, in accordance with Customer policy, working with ServiceNow should a delay be needed
- Document plan for rolling back changes and restoring to pre-upgrade attempt state
- Plan for alternate activities during the maintenance window, for example paper tickets
- Plan for notification of upcoming upgrade, start and completion of upgrade
- Plan for post-upgrade testing and validation

2.1.2. ServiceNow security patches

For **CORE**, CDI will perform quarterly ServiceNow security patches per contracted instance. The following are some of the tasks and activities performed:

- Review announcement of need for security patching
- Assess impact of planned remediation
- Plan for rollback of the patching should a problem occur
- Coordinate maintenance window in accordance with Customer policy
- Plan for notification of upcoming upgrade, start and completion of upgrade
- Plan for post-patching testing and validation as needed

2.1.3. ServiceNow Cloning

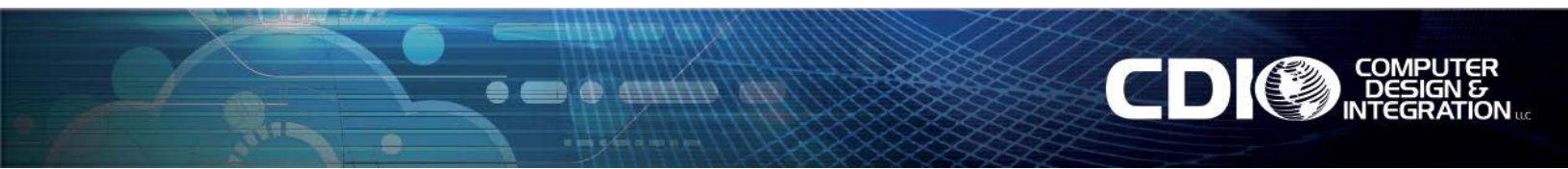
For **CORE**, CDI will perform ServiceNow cloning from one instance to another at agreed upon times during the year. The following are some of the tasks and activities performed:

- Backup update sets and changes on the target instance that will not move with update sets to preserve work not yet moved to the clone source instance
- Identify data to preserve
- Identify tables to exclude
- Identify other risks and steps to mitigate risks
- Schedule cloning according to Customer policy, notifying those who will be impacted
- Announce start and stop of the cloning
- Re-apply saved of update sets and other saved off changes as well as data
- Regression Test the target instance

2.1.4. ServiceNow instance review

For **CORE**, CDI will perform quarterly ServiceNow platform instance reviews. The following are some of the tasks and activities performed:

- Review quarterly engagement with CDI, including ticket history and resolutions
- Instance initiatives/roadmap review and planning
- Document thoughts for remediation of current issues
- Prepare exec findings reports and review
- Access to a ServiceNow expert onsite for a full day during each review for Q&A, architecture guidance, etc.



2.2. Advanced

The **ADVANCED** package includes the **CORE** services outlined above plus the additional support services outlined in the table below. This package is designed to provide reactive technical support for an existing ServiceNow deployment. The bundled hours are limited to advisory, defect resolution and general support and not intended for new enhancements or major platform expansions or initiatives.

ADVANCED Component	Description of Scope of Services
Virtual administration	<ul style="list-style-type: none">• Monthly administrator meeting• On-demand advisory services• Service Request fulfilment
Technical support	<ul style="list-style-type: none">• End to end case management of submitted support issues with the instance• Escalation and case management with ServiceNow technical support as necessary• Remediation upon request
Minor Enhancements	<ul style="list-style-type: none">• Changes with minimal impact to existing process

2.2.1. Virtual administration

For **ADVANCED**, CDI will perform virtual administration services. The following are some of the tasks and activities performed:

- User, group, role administration
- Password reset support
- Company, Department, Division, Location administration
- Localization/Language administration
- Access Control List (ACL) setup
- LDAP/SSO Integration setup and updates
- Manual Configuration Item updates
- Update set management and promotion
- Minor application and module changes and enhancements
- UI Customizations - Move data and non-update set changes between instances

2.2.2. Technical support

For **ADVANCED**, CDI will provide ServiceNow platform technical support services. The following are some of the tasks and activities performed:

- Remotely troubleshoot and fix issues raised by the Customer. Provide support for currently implemented applications and functionality.
- If the CDI services team determine a configuration or platform issue relates to a 3rd party vendor, CDI will escalate to the vendor's technical support and provide end to end case management for the support issue for the Customer.

2.2.3. Minor Enhancements

For **ADVANCED**, CDI will deliver minor ServiceNow enhancements. The following are some of the tasks and activities performed:

- Adding or Removing form fields
- Creating new reports and dashboards
- Adding and/or maintaining low complexity catalog items
- Creating new change templates
- Configure integrations leveraging 'out-of-box' connectors

Customer may choose to use some, or all, of their Virtual Administration hours for enhancements. Each enhancement will be evaluated by the CDI technical team to determine required level of effort to ensure contracted hours are not exceeded.

Enhancements that are deemed to require a higher level of effort than total contracted hours per month, will be categorized as Major Enhancements and will be captured in customer backlog. Completion of such enhancements may require a change request to increase Virtual Administration hours or a separate statement of work.

Major Enhancements include, but are not limited to:

- Configuration of additional applications and/or modules that are not currently in use
- Changes that require new process definition or have high impact to existing process
- Catalog items with complex workflows or requiring 3rd party system integrations
- Integrations to external systems that are not supported by an 'out-of-the-box' connector and require custom API calls
- Development of custom applications

2.3. NextGen

The **NEXTGEN** package includes the **CORE** and **ADVANCED** services outlined above plus provides the additional roles and services outlined in the table below. This package is designed to not only provide support for an existing deployment but to also proactively help drive the evolution and enhancement of the ServiceNow platform. In addition, the package includes services that aid in maintaining the accuracy and health of key ServiceNow components.

2.3.1. CDI Provided Roles and Functions

As part of the **NEXTGEN** service, CDI will supply resources that fulfil the required roles to successfully maintain the ServiceNow platform for the Customer. The CDI provided roles and the description of each role is found in the table below.

Role	Description
Product Owner (SDM)	<ul style="list-style-type: none">• Interfaces with client's product owner and executive sponsor• Owns the platform backlog and roadmap from a CDI perspective• Leads the administration / development teams• Prioritizes development of enhancement and new features• Responsible to serve as the liaison / interface between the business and the platform team
Project Manager	<ul style="list-style-type: none">• Interfaces with client's Project Managers and Team• Manages day to day activities for the platform team• Works with the team to produce reports on team activities and performance• Manages how team members communicate and how information is exchanged• Facilitates the change and release management processes• Where development is blocked, the project manager is responsible to engage the right people to unblock
Architect	<ul style="list-style-type: none">• Overall technical solution designer• Evaluates client business requirements and writes development stories for the administration / development team• Has overall technical responsibility for the platform
Business Process Consultant	<ul style="list-style-type: none">• Interfaces with Client's Business Analyst(s)• Brings industry and CDI best practices• Supports client's process owners and helps drive the organizational change management process to ensure successful platform adoption
Developer	<ul style="list-style-type: none">• Develops, tests, and deploys platform enhancements and new features• Performs integrations with external systems• Concerned with all facets of the software development lifecycle (SDLC)
Platform Administrator	<ul style="list-style-type: none">• Performs day to day administration of the ServiceNow platform• Monitors and troubleshoots platform performance• Monitors and works incidents and service requests not requiring software development• Performs required instance cloning operations• Participates in the change and release management processes• Creates custom reports• Creates dashboards

Note: one or more roles may be fulfilled by a single resource, as appropriate. CDI will staff the roles as needed to meet the Customer's target velocity and ability to transform.

2.3.2. Client Provided Roles and Functions

The **NEXTGEN** service is designed to provide continuous evolution of the ServiceNow platform. This is highly dependent on the commitment from the client. Additionally, it is not practical or possible for CDI to provide all of the roles and/or functions required on behalf of the client to be successful. Client agrees to provide the following roles/functions.

Role	Description
Executive Sponsor	<ul style="list-style-type: none">• Shapes the scope and vision of the ServiceNow platform and how it enables digital transformation• Secures sponsorship and commitment from the organization to drive ServiceNow adoption• Serves as a point of escalation• Removes barriers where appropriate
Product Owner	<ul style="list-style-type: none">• Interfaces with CDI's product owner• Owns the platform backlog and roadmap from a Client perspective• Interfaces with various internal client department heads to fulfill project initiatives• Prioritizes development of enhancement and new features• Responsible to serve as the liaison / interface between the business and the platform team
Project Manager	<ul style="list-style-type: none">• Interfaces with CDI's Project Managers and Team• Manages day to day activities for the platform team• Works with the team to produce reports on team activities and performance• Manages how team members communicate and how information is exchanged• Facilitates the change and release management processes• Where development is blocked, the project manager is responsible to engage the right people to unblock
Process Owner(s)	<ul style="list-style-type: none">• Interfaces with CDI's Business Analyst(s)• Brings client specific workflows and requirements and industry knowledge• Helps drive the organizational change management process to ensure successful platform adoption
Trainers	<ul style="list-style-type: none">• Trains and supports client staff on enhancement rollout and initiatives
Technology SMEs	<ul style="list-style-type: none">• Must have active participation by various IT department heads when assistance or participation by them or their staff is required to support an enhancement request (ie CMDB feeds/ links to various tools, enhancement adoption and rollout, etc)

Note: As is the case with CDI, Customer may choose to consolidate roles across resources, as appropriate.

2.3.3. Activities

As part of the **NEXTGEN** service offering, the CDI platform and customer team will conduct a series of “steady state” activities and meetings. The activity and meeting cadence is modeled after industry standard agile development practices that are aimed at providing transparency and ensuring continued innovation and platform development / adoption. The table below describes the expected steady state activity and meeting cadence, and expected participants from both CDI and Customer.

Activity	Frequency	Duration	CDI Participants	Client Participants
Code, Test, Accept	Daily	As needed	Developer Administrator / Reporter	Project Manager Technology SMEs
SCRUM Call	2-3x Weekly	0.5 hr	Project Manager Architect Business Analyst Developer Administrator / Reporter	Project Manager Technology SMEs
Sprint Planning	Bi-weekly	2 hrs	Product Owner (SDM) Project Manager Architect Developer Administrator / Reporter	Product Owner Project Manager Technology SMEs
Sprint Review	As needed	1-2 hrs	Product Owner (SDM) Project Manager Architect Developer Administrator / Reporter	Product Owner Project Manager Technology SMEs
Sprint Retrospective	As needed	1 hr	Product Owner (SDM) Project Manager	Product Owner Project Manager
Backlog Refinement	Weekly	1 hr	Product Owner (SDM) Project Manager Architect	Executive Sponsor Product Owner Project Manager Technology SMEs
Program Status	Monthly	1 hr	Product Owner (SDM) Project Manager Architect	Executive Sponsor Product Owner Project Manager
Release / Deploy	Monthly	n/a	Product Owner (SDM) Project Manager Architect	Executive Sponsor Product Owner Project Manager
Strategy & Review	Monthly	1 hr	Product Owner (SDM) Architect	Executive Sponsor Product Owner Project Manager Process Owner
Workshops	As needed	TBD	Product Owner (SDM) Business Analyst	Executive Sponsor Product Owner Project Manager Process Owner Technology SMEs
Roadmap Planning	Quarterly	2 hours	Product Owner (SDM)	Executive Sponsor

			Business Analyst	Product Owner Project Manager Process Owner Technology SMEs
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Appendix A. : Service Level Objectives

All activities will be performed in an SLO based service delivery model. However, because there is no lockdown on the environment, important onsite operational requirements such as availability, capacity, and outages will be the responsibility of your IT team. Your IT team should inform us of any device addition or deletion, as well as any changes to your ServiceNow environment.

The following table describes the various priority levels associated with incidents. The sources of alerts are either from the monitoring system or from user requests entered via the ticketing system, phone or emails.

Priority Definitions

Priority	Resolution SLO	Mode of escalation
P0: Critical *Monitored events	This is an EMERGENCY condition that significantly restricts the use of an application, system, network or device to perform any critical business function. This could mean that several departments in the organization are impacted. Direct calls will be made by the NOC to the designated IT contact.	Phone, Email and Ticket
P1: High	The reported issue may severely restrict use of an application, system, or device in the network. This could mean that a single department is impacted but the overall network and servers are functioning.	Email and Ticket
P2: Medium	The reported issue may restrict the use of one or more features of the application, system, network or device, but the business or financial impact is not severe.	Email and Ticket
P3: Low	The reported anomaly in the system does not substantially restrict the use of one or more features of the application, system, network or device to perform necessary business functions.	Email and Ticket

Service Levels for CORE Escalation

Priority	Service Response Time	Customer Notification (During Business Hours)	Customer Notification (After Business Hours)
P0: Critical	N/A	N/A	N/A
P1: High	2 hrs.	Email sent and ticket updated within 2 hrs.	Email sent and ticket updated within 2 hrs.
P2: Medium	4 hrs.	Email sent and ticket updated within 4 hrs.	Email sent and ticket updated within 4 hrs.
P3: Low	12hrs.	Email sent and ticket updated within 12 hrs.	Email sent and ticket updated within 12 hrs.

Service Levels for ADVANCED (Technical Support Access)

Priority	Service Response Time	Customer Notification (During Business Hours)	Customer Notification (After Business Hours)
P0: Critical	N/A	N/A	N/A
P1: High	2 hrs.	Email sent and ticket updated within 2 hrs.	Email sent and ticket updated within 2 hrs.
P2: Medium	4 hrs.	Email sent and ticket updated within 4 hrs.	Email sent and ticket updated within 4 hrs.
P3: Low	12hrs.	Email sent and ticket updated within 12 hrs.	Email sent and ticket updated within 12 hrs.

Service Levels for ADVANCED (Virtual Consultant)

Priority	Service Response Time	Customer Notification (During Business Hours)	Customer Notification (After Business Hours)
P0: Critical	N/A	N/A	N/A
P1: High	2 hrs.	Email sent and ticket updated within 2 hrs.	Email or Call by next business day
P2: Medium	4 hrs.	Email sent and ticket updated within 4 hrs.	Email or Call by next business day
P3: Low	12hrs.	Email sent and ticket updated within 12 hrs.	Email or Call by next business day

Service Levels for NEXTGEN

Role	Service Response Time	Customer Notification (During Business Hours)	Customer Notification (After Business Hours)
P0: Critical	N/A	N/A	N/A
P1: High	2 hrs.	Email sent and ticket updated within 2 hrs.	Email or Call by next business day
P2: Medium	4 hrs.	Email sent and ticket updated within 4 hrs.	Email or Call by next business day
P3: Low	12hrs.	Email sent and ticket updated within 12 hrs.	Email or Call by next business day

Appendix B. : General Client Requirements

- Client must maintain a valid ServiceNow Licensing Agreement with ServiceNow
- Client agrees to cooperate with CDI for the scheduling of upgrades or any other service aspects
- Client ServiceNow system must be at the current ServiceNow version or 1 version behind
 - Any variance from this is subject to a “Get Well” project which would get Client up to current versioning prior to CDI assuming responsibility for the platform / upgrade cycle.