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Coaching Loops

ServiceNow User Group Swiss Romande

Shiva Thomas, Nov. 30th 2017

What are Coaching Loops?

- ▶ **A process for providing frequent feedback**

Its recognized that people achieve high performance through a base level of ability and a culture of constantly identifying improvements. Lets take this and apply it to Service Management individuals.



What are Coaching Loops?

- ▶ **A method of improving performance using iterative feedback loops**

Coaching loops are a method for inspecting your existing processes for opportunities to provide feedback. By repeating this on a regular basis you guide individuals towards high performance.



What are Coaching Loops?

- ▶ You can improve the outcome of your process... from within the process

This is the "killer feature" of the Coaching Loops product. Unlike all other methods of improving performance you now have the ability to positively influence the outcome of a process. In all other feedback methods - annual or monthly appraisals for example, you are only able to **review** the outcome of the process.

Coaching Loops offer a way of **influencing the individual towards a successful outcome.**



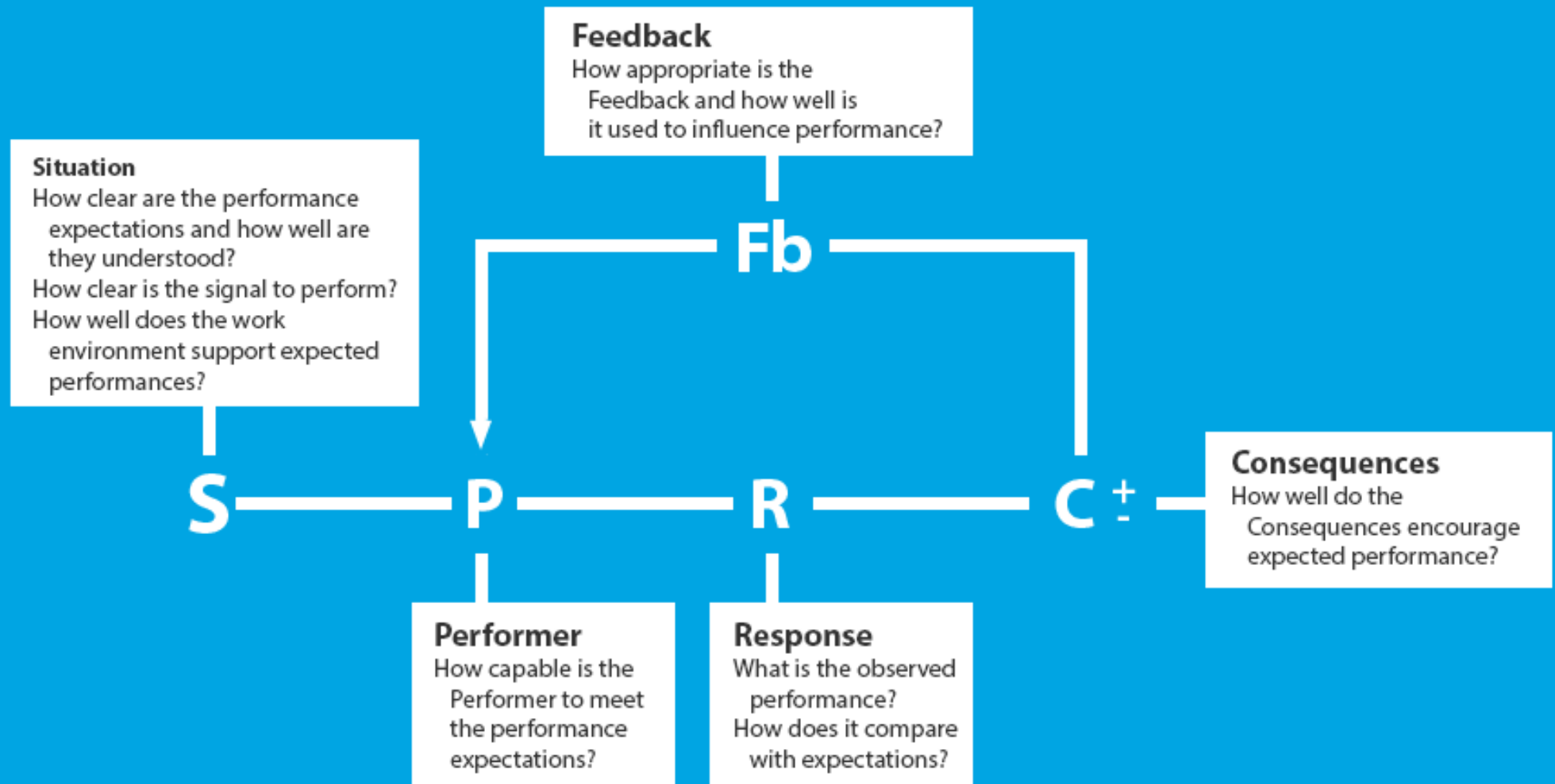
What are Coaching Loops?

- ▶ They implement the **Kepner-Tregoe's Performance System**, a wonderful tool to help embed process or behaviors that are consistent with and complement the services approach!
- ▶ The Coaching Loops feature enables a **coach** to monitor a specific behavior in an individual or group (**coachee**), and provide timely feedback so that the coachee can do a better job the next time.
- ▶ They can be applied to any task-based process.



The Performance System

KT



Lexicon

- ▶ The Now platform evaluates **coaching opportunities** against **coaching disciplines** to generate **coaching assessments**.
- ▶ **Discipline:** ie “Incident Management” or “Writing User Stories”
- ▶ **Opportunity:** ie “First Response”, “Transfer of Incident” or “Proposing Solution”
- ▶ **Assessment:** ie Did the coachee follow all rules?
How is data quality?

Steps Required

1. Activate the plugin
2. Create a **coaching discipline**: define the process on which a coachee can be coached.
3. Create a **coaching opportunity**: define the critical moments in a process where a coachee can be coached.
4. Complete **coaching assessments**: review the work of a coachee and provide timely feedback.



Plugin Activation

The screenshot displays the ServiceNow Service Management interface. On the left, a sidebar contains a search bar with 'plugin' and a filter icon, and a list of items including 'System Definition' and 'Plugins'. The main content area shows a list of 'System Plugins' with a search filter 'All > Name starts with coaching loop' and a table listing 'coaching loop' and 'Coaching Loops'. A modal window is open for the 'Coaching Loops' plugin, showing details such as ID, Name, Version, Help link, Requires, and Description. A green arrow points to the 'Activate/Upgrade' link in the 'Related Links' section of the modal.

ServiceNow Service Management

plugin

System Plugins Go to Name

All > Name starts with coaching loop

Name

coaching loop

Coaching Loops

System Plugin Coaching Loops

ID: com.snc.coaching_loops

Name: Coaching Loops

Version: 1.0.0

Help: http://docs.servicenow.com/?context=Coaching_Loops

Requires: com.snc.planned_task, com.glideapp.custom_charts

Description: This plugin adds coaching functionality. This plugin facilitates opportunities that can be conditionally configured.

Related Links: [Activate/Upgrade](#)

Activate here

New UI Elements

Self Dashboard for completed assessments

ACL: itil or cl_user

Active assessments

The screenshot shows a mobile application interface with a dark theme. At the top, there is a search bar containing the text 'coaching' and a close button (X). Below the search bar is a navigation bar with three icons: a folder, a star, and a clock. The main menu consists of several items: 'Service Desk', 'My Coaching History', 'Coaching Loops', 'Coaching Disciplines', 'Coaching Opportunities', and 'Assessments'. Green arrows point from the text on the left to these menu items: 'Self Dashboard for completed assessments' points to 'My Coaching History', 'ACL: itil or cl_user' points to 'Coaching Loops', 'Active assessments' points to 'Assessments', 'ACL: Admin' points to 'Coaching Disciplines', and 'or cl_admin' points to 'Coaching Opportunities'.

Short description Non-critical Incident Service Desk Coaching

* Discipline Incident [incident]

Condition Add Filter Condition Add "OR" Clause

Select the group whose members are eligible for coaching for this discipline.

is not 1 - Critical AND OR X

* Order 100

Roles

* Coachee group Service Desk

* Coaching group Coaching - ITSM

User peer reviewers

Group peer reviewers Service Desk

Sample Size

Select the group whose members are eligible for coaching for this discipline.

Hours 00

Beth Anglin

Select peers, or group of peers, who can review the work of the coachee. Peers are individuals involved in the event that triggered the coaching assessment. They can provide peer feedback in addition to the feedback provided by the coach. The coachee is automatically excluded.

Short description Non-critical Incident Service Desk Coaching

* Discipline Incident [incident]

Condition Add Filter Condition Add "OR" Clause
Priority is not 1 - Critical AND OR X

Active * Order 100

Set the time in which a coaching assessment must be completed.
If the assessment is not completed in this duration, the Platform automatically closes the assessment as *Closed Incomplete*.



User peer reviewers
Group peer reviewers Service Desk

Sample Size

Assessment duration Days 2 Hours 00 00 00

* Sample Size (%) 100

Coach on every opportunity Beth Anglin

Take first coaching opportunity

Time to look back Days 1 Hours 00 00 00

Short description Non-critical Incident Service Desk Coaching

* Discipline Incident [incident]

Condition Add Filter Condition Add "OR" Clause

Priority is not

Active

Select this check box to disregard the Sample Size if a user has not been coached for longer than the period specified in the Time to look back field. If this amount of time has passed since a user's last coaching assessment, the coach should take the first opportunity to work with the user again.

Roles

* Coaches group

Specify the percentage of coaching opportunities that generate coaching assessments

Group peer reviewers Service Desk

Sample

Assessment duration Days 2 Hours 00 00 00

Take first coaching opportunity

* Sample Size (%) 100

Coach on every opportunity Beth Anglin

Recent hires could be added here

Short description Incident closes without Business Service

* Table Incident [incident]

Select the table to be evaluated for coaching opportunities

Condition Add Filter Condition Add "OR" Clause

All of these conditions must be met

Business service is empty AND OR X

Active changes to false AND OR X

Define the event that triggers a coaching opportunity for the selected table. Conditions for opportunities are generally unique events such as when field changes.

You can include JavaScript inside <mail script> tags to add functions and use the current / previous values of all fields.

Snapshot
An assessment has been created for \${assigned_to} because Incident \${number} has been closed without Business Service.

The snapshot is the description that will help the coach to get some context, Use Email Template syntax to describe the evaluation process applied to the selected table. You can use fields from the Table selected on the coaching opportunity record.

Use Cases Examples

▶ Incident Management

Timing of first response

Categorization & Prioritization

Reassignment

Proposal of solution to the customer

▶ Problem Management

Definition of the Problem statement

Writing the Known Error

Writing the Workaround

Root Cause Analysis

Root Cause confirmation

How can this never happen again?



Use Cases Examples

► Change Management

Categorization & Prioritization

Implementation description

Risk analysis

Impact analysis

Approval

Implementation

Post implementation review

► Agile SDLC

Story writing

Code review when stories are completed

Test definitions



Number: CLAS0010004

Assessment of: Beth Anglin

Record: Incident: INC0000041

Due date: 2017-12-01 03:19:1

Coaching discipline: Non-critical Incident

Parent: []

State: New

Assignment: Geneva Coaching



Snapshot



Snapshot: An assessment has... Please kindly train...

Assessment Details

Quality of data: N/A

Followup needed: -- None --

Short description: []

Description: []

Work notes: []

Select the current stage of the assessment

- **New** Assessment as not started.
- **Under Review** Coach and coachee discuss the performance.
- **Closed Complete** The assessment has been completed successfully.
- **Closed Incomplete** The assessment has been closed but was not completed, usually because the coaching discipline's assessment duration has expired.

Assessment
CLAS0010004

Number: CLAS0010004

Assessment of: Beth Anglin

Record: Incident: INC0000041

Due date: 2017-12-01 03:19:11

Coaching discipline: Non-critical Incident Service Des

Snapshot

Snapshot: An assessment has been created for ITIL User because Incident
Please kindly train the coachee as to select the relevant Business

Assessment Details

Quality of data: N/A

Short description:

Followup needed: -- None --

Indicate what further action is required, if any, to improve the performance of the coachee.

- **None**
- **Additional Coaching Needed** The coachee needs additional feedback from the coach.
- **Training Needed** indicates that the coachee needs additional training outside the scope of the coaching assessment.
- **Lack of Due Diligence** indicates a major issue with the coachee's performance.



Select a value of the performance of the coachee for reporting and trend tracking purposes.

- ✓ N/A
- Excellent
- Good
- Average
- Poor
- Empty

Number: CLAS0010004

Assessment of: Beth Anglin

Record: Incident: INC0000041

Due date: 2017-12-01 03:19:11

Coaching discipline: Non-critical Incident Service Des

Complete Assessment
Saves and closes the assessment as completed.

Thank Coachee
Saves and closes the record and sends an email to the coachee signifying the completion of the assessment.

Snapshot

Snapshot: An assessment has been created for ITIL User because Incident INC0000041 has been closed without Business Service. Please kindly train the coachee as to select the relevant Business Service.

Assessment Details

Quality of data: N/A Followup needed: -- None --

Short description: Enter Summary

Description: Enter a detailed description of the assessment

Work notes: Add additional notes as the coach and coachee discuss

Assessment CLAS0010004

Follow Update Review Assessment

Number	CLAS0010004	Parent	
Assessment of	Beth Anglin	State	Closed Com
Record	Incident: INC0000041	Assignment group	Geneva Coa
Due date	2017-12-01 03:19:11	Assigned to	

Snapshot Assessment Details

Quality of data	Average	Followup needed	
Short description	Missing Business Services		
Description	Business Service for Wifi issues should be IT Infrastructure		

Update Review Assessment

Selecting **Review Assessment** changes the assessment State to "Under Review" and allows the coachee to add Work notes to a closed assessment record.

After completion, assessments are available for the coachee to review.

Technical Tips & Tricks

- ▶ Every record update starts a search for a matching opportunity, then for a matching discipline. If both are found, triggering an assessment is considered.
- ▶ This can NOT trigger multiple Assessments. This stop at first match.
- ▶ For non **itil** coachees, assign the role **cl_user**.
- ▶ Since coachees are already fulfillers, there's no extra licensing cost.
- ▶ You can use the coaching process on tables that do not extend the Task table. Duplicate the business rule **Coaching Opportunity creator for Task**, specify a new table, make any other necessary modifications, and save the new BR under a new name.

Some Improvements for the **Assessment form**

- ▶ Add lot of mouse-over Hints to fields.
- ▶ Create an interactive Guided Tour.
- ▶ Make Short Description mandatory.
- ▶ Add Activity History to the form.
- ▶ Update the Work Note field Type from “Journal Input” to “Journal”.
for UI16 consistency



History & Usage

- ▶ This plugin is from 2012 and have never been updated since.
- ▶ This gem received little publicity and is possibly the most useful AND most under-used plugin.
- ▶ Use this to gamify your team's performance.
- ▶ Think outside ITIL and apply this to all kind of task-based process.



Summary

- ▶ Coaching improves performance.
- ▶ Coaching has to be an iterative, on-going process. Irregular appraisals do not work.
- ▶ Coach on fresh data.
- ▶ If you want a world champion organization - do what the Olympic World Champions do!

Sources

- ▶ Unofficial Coaching Loops White Paper by **Simon Morris** (2012)
<https://community.servicenow.com/people/SimonMorris/blog/2012/05/18/2447>
- ▶ A ServiceNow presentation on Coaching loops by **Martin Pscheidl** (2016)
<https://community.servicenow.com/message/1085979>
- ▶ Official ServiceNow Documentation https://docs.servicenow.com/bundle/kingston-it-business-management/page/product/coaching-loops/concept/c_CoachingLoops.html
- ▶ Two posts from the Communities web site:
 - ▶ <https://community.servicenow.com/community/develop/blog/2015/05/28/put-me-in-coach-using-coaching-loops>
 - ▶ <https://community.servicenow.com/message/708583>