

Business Technology Vision Roadmap

Automation Case Study

At-a-Glance Brief

Context

The enterprise used document-based BTVR templates in SharePoint to plan technology initiatives. This create

Intervention

As Senior Business Analyst, I analyzed the process, identified systemic breakdowns, and defined a ServiceNo

Designed Outcome

A standardized intake process, consistent scoring model, guided workflow, and executive dashboards. Implem

● Designed

● Approved

■ Implementation Paused

Problem Statement

What Leadership Saw

- Multiple template versions circulating
- Inconsistent prioritization approaches
- Email-based review processes
- Static documents vs. usable data
- Fragmented leadership visibility

What Was Actually Happening

- Portfolio teams working from different versions created confusion and duplicate work
- Scoring applied inconsistently made cross-portfolio comparisons unreliable
- Reviews moved through email without clear ownership or audit trail
- Planning information trapped in documents instead of structured fields
- No single trusted view for enterprise roadmapping decisions

Objective

Define a standardized and automated BTVR process

- Create consistency in initiative capture, evaluation, and discussion
- Improve transparency across business, technology, and leadership
- Reduce manual effort and confusion for contributors and reviewers
- Establish ServiceNow as reliable system of record
- Enable clear portfolio and enterprise-level insights

Proposed Solution

ServiceNow APM-based automation to replace document-driven process

Unified Intake Form

Single ServiceNow experience with validation and conditional logic

Standardized Scoring

Consistent requirements approved through governance

Guided Review Workflow

Defined steps with routing, audit history, and SLAs

Executive Dashboards

Portfolio and leadership views with meaningful metrics

Historical Data Strategy

Mapping legacy content into structured fields

Governance Enforcement

Template retirement and ServiceNow as single source

Key Analysis and Decision Areas

Root Cause Analysis Identified inconsistency and data quality issues

Data Standardization Defined standard elements and scoring rules

Governance Balance Aligned governance needs with contributor usability

Workflow Clarity Clarified ownership and review expectations

Delivery Sequencing Phased approach to reduce disruption

Delivery Strategy

Phased implementation to reduce risk and support organizational readiness

Phase 1 Standardized Intake and Scoring

Phase 2 Workflow Automation and Dashboards

Phase 3 Historical Data Migration and Reporting

Planned Outcomes and Value

- Reduced Confusion** Eliminated rework through standardization
- Improved Trust** Enhanced confidence in prioritization
- Shortened Cycles** Accelerated review processes
- Increased Visibility** Better insights for leadership
- Scalable Foundation** Reusable framework for enterprise planning

Final Assessment

This case study documents **senior Business Analyst leadership** focused on strategic clarity, govern

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