

# Strategic Portfolio Management

Artificial Intelligence

Principal Platform Architect at ServiceNow  
Bill Bonnett

“

**Do the best you can until you know better.**

**Then when you know better, do better.**

— Maya Angelou

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# Agenda

“

**Generative AI** may not take your job,

but the person who learns to use

**AI** will.

# Generative AI - It's not about "if" but "how" to put AI to work for your business

1

GenAI is a  
gamechanger

2024 is the year to put AI in  
production

2

GenAI is a strategic  
initiative

Strategize, Align, and  
Execute

3

Strategic Planning is  
essential

SPM turbo charges GenAI

# We are at an inflection point ✨

Generative AI has changed how people interact with technology

Users expect fast, accurate and autonomous AI to work on their behalf

We are entering a new era of collaboration between **AI** and **humans**



# Gen AI can power end-to-end process



## Business Leaders

Provide instant identification of Goals / OKRs at risk.



## ePMO / Portfolio Managers

Afford optimum agility in planning portfolios & resolving capacity constraints.



## Product Managers

Accelerate ability to understand & action feedback at scale.



## Project Managers

Increased productivity with automated status reports.



## Development Teams

Exponentially faster time to build and configure apps – faster time to market.



**Agentic AI** refers to artificial intelligence systems designed to act autonomously and proactively in a goal-directed manner.

Agentic AI can make decisions, taking actions, and interacting with their environment without continuous human intervention. The term "agentic" comes from the word "agency," which refers to the ability of an entity to act or exert control over its environment.

# Strategists

CIOs, Executive Leaders, SROs

- **Goals:** Drive the strategy while maintaining visibility across the organization.
- **Main Challenge:** Build a strategy that is focused on the right things and can maximize outcomes.

# Aligners

Product Leads, EPMOs, EAs, IT PMOs

- **Goals:** Balance priorities with resource capacity, facilitate coordination among siloed teams, and focus on value creation.
- **Main Challenge:** Align resources to respond quickly and efficiently to rapid changes in strategy.

# Deliverers

Product / Project / Program Managers

- **Goals:** Identify pain points accurately, collaborate effectively to build better products, optimize product development efficiency.
- **Main Challenge:** Maximize value delivery while communicating effectively across different teams.

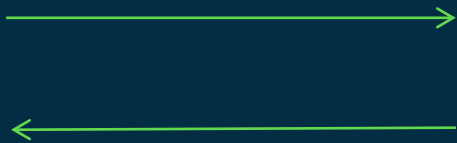
# What we have today

“Wave 1” of generative AI has been simple actions taken in response to direct human prompting

- Ask a question
- Click a button



Human



- Provide an answer
- Summarize something
- Build something



Gen AI

Knowledge Worker

Agile & Project teams

Product, Project & Portfolio Managers

Admin

## Conversational Demand Creation

Ensure the completeness of data to save time when creating demand requests

## Email Project Summary

Use GenAI to give prioritized insights into the most important changes that have happened.

## Document Summarization

Enhance team productivity through the ability to summarize, condense, or expand text

## Analyze Product Feedback Faster

Leverage multi-feedback summarization to quickly synthesize insights from various sources making it easier to act faster on customer feedback

## Generate Epics/Features/Stories

Create epics, features & stories from text (including surfacing potential similarities)

## Data visualization generation

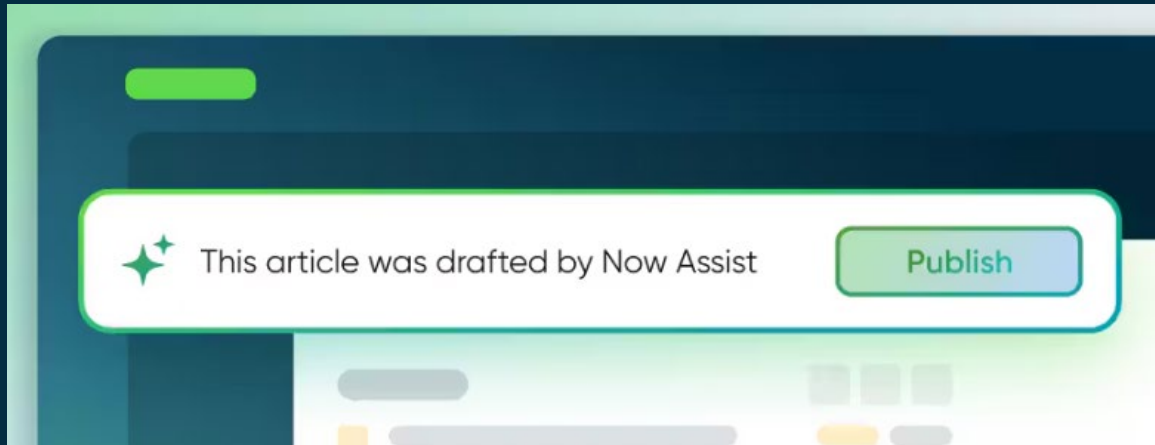
Transform natural language into interactive analytics visualizations

## Custom skill development

Easily build, test, configure, and publish new GenAI skills

# What we have today - examples

- GenAI can
  - draft new articles based on incidents
  - elaborate or shorten existing articles
  - summarize multiple incidents
  - create service catalog items
  - write and optimize code



Incident Management \*



Knowledge Management \*



Summarizations \*



Create Catalogs \*



Optimize / Manage \*

# What we'll have tomorrow

Specialized AI Agents will work together as a team to effectively achieve specific business outcomes



Teams of agents will be able to:

1. *Autonomously analyze complex situations*
2. *Generate strategic insights*
3. *Execute actions in alignment with business goals*

# Product Planning – Today

Jon needs to go from discovery to product planning



Discovery notes are stored on SharePoint

Review the notes and designs to create epics

Update epics from reviews with engineering

Create stories

I generated Stories

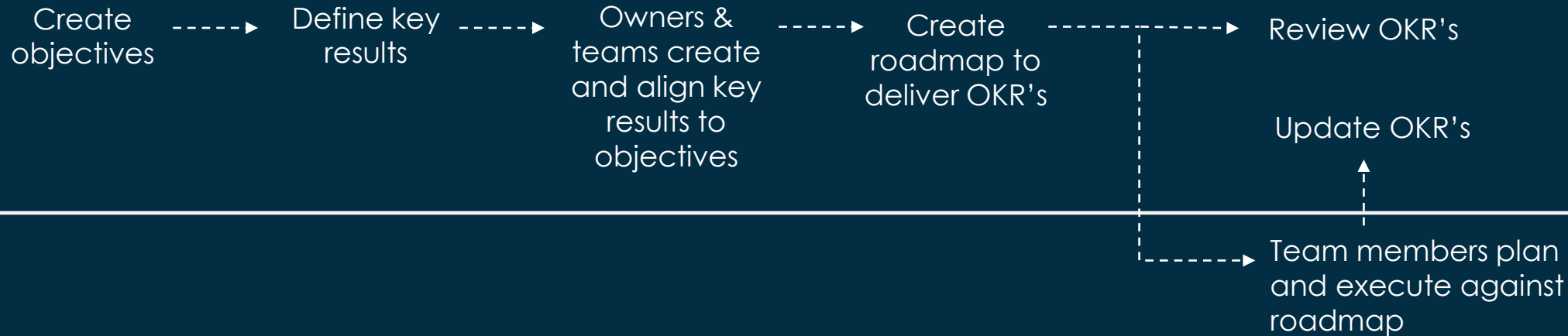
Add the stories to sprints

Story Generation skill



# OKR Planning – Today

Sarah needs to set clear and measurable OKRs to align and focus teams on achieving strategic outcomes



# OKR Planning – With AI Agents



Generate objectives from multiple sources

Define key results

Generate initiatives

Generate a summary of OKR statuses

OKR Agent



AI Agents Orchestrator



OKR AI Agents



OKR AI Agents



OKR AI Agents



OKR AI Agents



OKR AI Agent assists Sarah

To create objectives – include inputs from

1. Leadership meeting summaries
2. Docs (e.g., Decks, Sheets)
3. External market materials

Summarize from multiple sources in and outside of platform



Connect to data sources for product(s)

Looks good. Go ahead

To create key results –include

1. data from objectives
2. inputs from docs, meetings, & messages



Looks good. Go ahead

Review OKR summary



Looks good.



# Product & OKR Planning – AI Agent to AI Agent



Generate objectives from multiple sources

Define key results

Generate epics

Align epics to initiatives and OKRs

Generate new OKR's if needed

Generate stories

OKR Agent  
Product Manager Agent



AI Agent to AI Agent assist both Jon and Sarah

Connect to data sources for product(s)

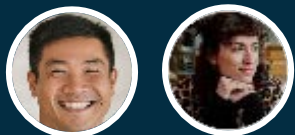
Create backlog and set capacity limits based on recent sprints

Schedule the stories in sprint

Generate sprint insights and epic status

Update OKRs

Generate a summary of OKR statuses



Team members work on stories

# Enter a Brave New World

## BEFORE

Spent hours every week compiling status reports

Manually write meeting summaries and translating them to action items

Chasing team members for follow ups and status updates

Sifting through hundreds of customer feedbacks to extract themes and prioritize roadmap

## AFTER

Regular and contextual updates are automatically sent to stakeholders

Enable stakeholders' hyper-personalized experience

"Expert Agents" following up on tasks and to-dos

More time to spend more time with your customers and stakeholders

# Value Proposition

## Leverage Existing Gen AI Capabilities to Improve Productivity and Simplify Tasks

### Improve productivity and save time



**Save time and effort** through content generation, summarization, and notifications



**Streamline process management** to ensure people are empowered to follow best practices



**Meet people where they work** through integrations and AI Agents

### Simplify Complex Tasks



**Bridge decision paralyses** by providing insights to guide decision-making



**Recommended actions**, suggest mitigations and resolution steps to enhance portfolio planning

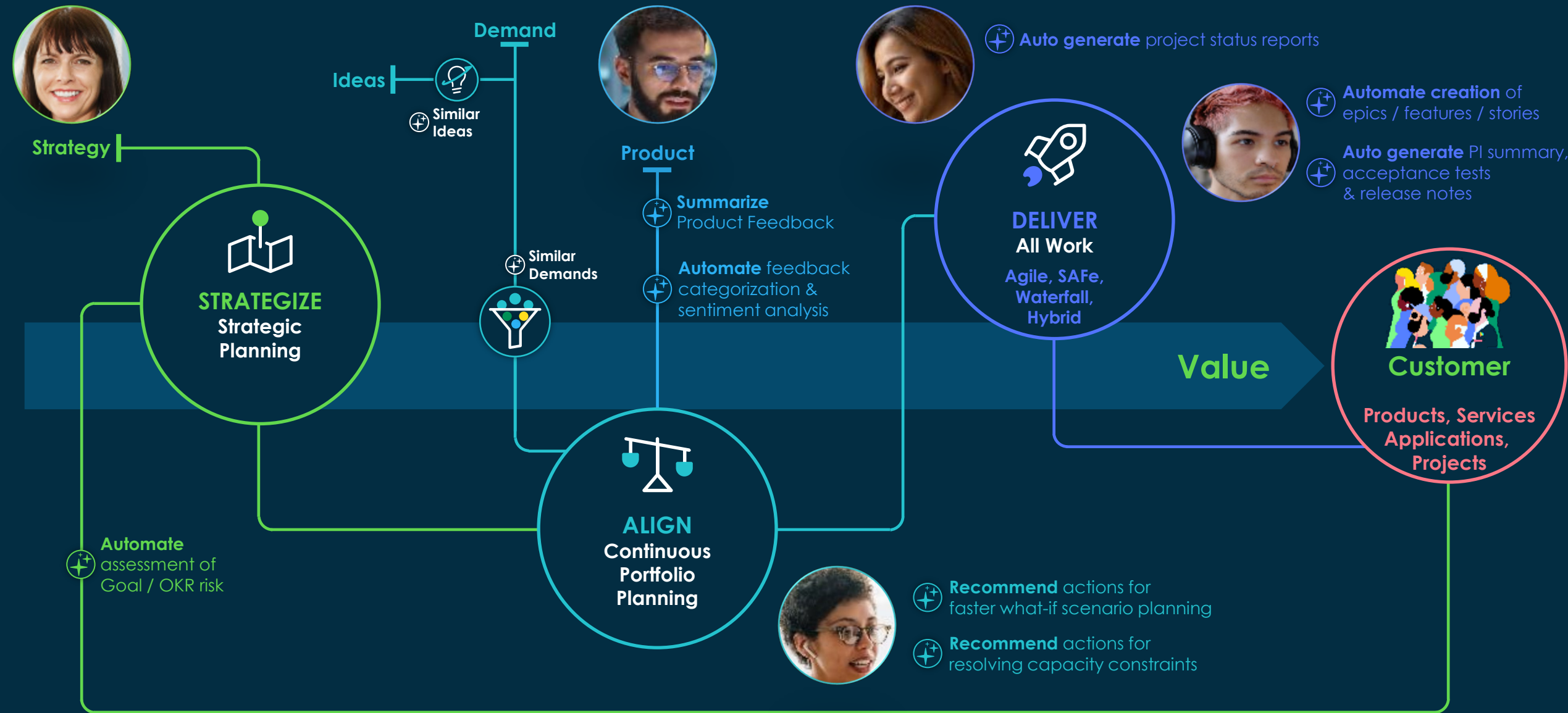


**Reduce knowledge threshold** to enable people from all skill-levels performing complex tasks

# Proposed Phased Value Drivers

- 1** Streamline data for holistic visibility *Integrations, AI Search, and Workflow Data Fabric*
- 2** Transform user experience *GenAI Assistant, Virtual Agent, and AI Agents*
- 3** Accelerate workflows and maximize outcomes *Content Generation and Enrichment, Admin Experience*
- 4** Support decision making *Data Analysis and Recommended Actions*

# AI powering end to end process



# AI Terminology

Term	Definition
Artificial intelligence	Systems designed to do work that needs a level of human intelligence to accomplish.
Models	Collections of algorithms, math, and statistics that make predictions and decisions based on input-output data.
Generative models	AI Models that generate new data based on a given input.
Large language models (LLMs)	Generative AI models capable of generating human-like language at scale.

# AI Terminology

Term	Definition
Capability	A task to be accomplished through integrating with an internal or external service provider, such as summarization.
Capability definition	Model and provider definitions for a given capability or functionality, for example the OpenAI Completions API.
Prompt	The textual input provided to the LLM to process and generate content.
Token	The smallest unit of text that the LLM processes and uses to generate output
Hallucination	A situation where the LLM generates the wrong output; resulting from the knowledge the LLM has been trained not being applicable to the query.

# AI limitations

- Artificial intelligence and machine learning are rapidly evolving fields of study and machine learning models generate predictions based on patterns in data. You should evaluate your use of Generative AI for accuracy as appropriate for your use case, including employing human review as appropriate. ServiceNow does not endorse or assume any responsibility for the accuracy, completeness, legality, or appropriateness of any content generated with Generative AI Controller.
- GenAI models are trained on vast amounts of data, but they do not truly understand the meaning or context of the information. They can generate text that is factually correct and grammatically sound, but they may struggle with tasks that require deeper understanding or common sense. Humans can read between the lines, make inferences, solve problems creatively, and adapt to new situations.



# ChatGPT Prompting Guide

Act as a (ROLE)	Create a (TASK)	Show as (FORMAT)
Project Manager	Book Online	Spreadsheet
Accountant	Sales Copy	Summary
Mindset Coach	SEO Keywords	Word Cloud
Developer	Function	Code

# AI Prompt Examples

- Improve Text: “Revise the following paragraph to make it more concise and clear: ‘In order to make a cake, you will first have to ensure that you have all the ingredients that are necessary for the recipe. This includes flour, sugar, eggs, and butter.’”
- Creating Templates: “Generate a template for a weekly team status update email.”
- Writing Scripts: “Write a short script for a conversation between a customer service representative and a customer who is returning a product.”
- Generating Images: “Create an image of a serene beach at sunset with a palm tree on the side.”
- Writing Code: “Write a Python function to calculate the factorial of a number.”
- Creating Poems: “Generate a poem about the beauty of spring.”
- Designing Logos: “Design a logo for a company named ‘Eco Innovations’ that specializes in green technology.”
- Generating Jokes: “Generate 5 jokes.”
- Creating Business Plans: “Create a business plan outline for a startup in the renewable energy sector.”

# AI Prompt Examples (continued)

Be as verbose as you can to get exactly what you need

- **Prompt:** write a prompt for a LinkedIn post for someone working in project management – be verbose
- **Result:** Embarking on a new professional chapter, I am excited to announce the successful culmination of the [Project Name] initiative. This complex endeavor required meticulous planning, strategic execution, and unwavering dedication from a talented team of individuals. Through the synergistic application of [specific project management methodologies, e.g., Agile, Waterfall, or hybrid], we were able to overcome numerous obstacles and deliver a solution that exceeded expectations. I am immensely proud of the collective effort and look forward to future opportunities to apply my project management expertise to innovative and impactful projects.#projectmanagement #projectcompletion #teamwork #success #[industry/niche]

# ServiceNow Plug

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Our AI journey is about more than just automation—it's about creating AI that supports all end users, automates complex workflows, and enhances decision-making.

Amit Zavery  
President, CPO, & COO, ServiceNow

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# THE AI PLATFORM FOR BUSINESS TRANSFORMATION



One Platform. One Data Model. All your workflows.





**Thank you**