

Hello

My name is Maral Elliott and I am a **Mixed-Methods User Experience Researcher** with over a decade of proven success in fostering cross-functional collaboration and delivering human-centric outcomes.

I am skilled in diverse methodologies ensuring comprehensive research coverage through both traditional research (user-centered) and participatory action research (user-centric) methods.

I am passionate about cultivating an empirical culture through enabling cross functional teams with access to insights and learning opportunities and making empathy contagious.



Case study
ServiceNow FSM



My Role at ServiceNow: I lead the UX Research strategy and roadmap for Field Service Management (FSM) portfolio.

Product

Shaped product and UX strategy through foundational strategic research

Influenced short term feature roadmap through continuous tactical & directional research

Improved System Usability by through a unified TopTasks and Benchmarking Practice

People

Built a strong cross disciplinary partnership

Grew the team to 3 UX Researchers

Mentored Jr and Sr Researchers

Process

Recruiting:
Built an active community of participants

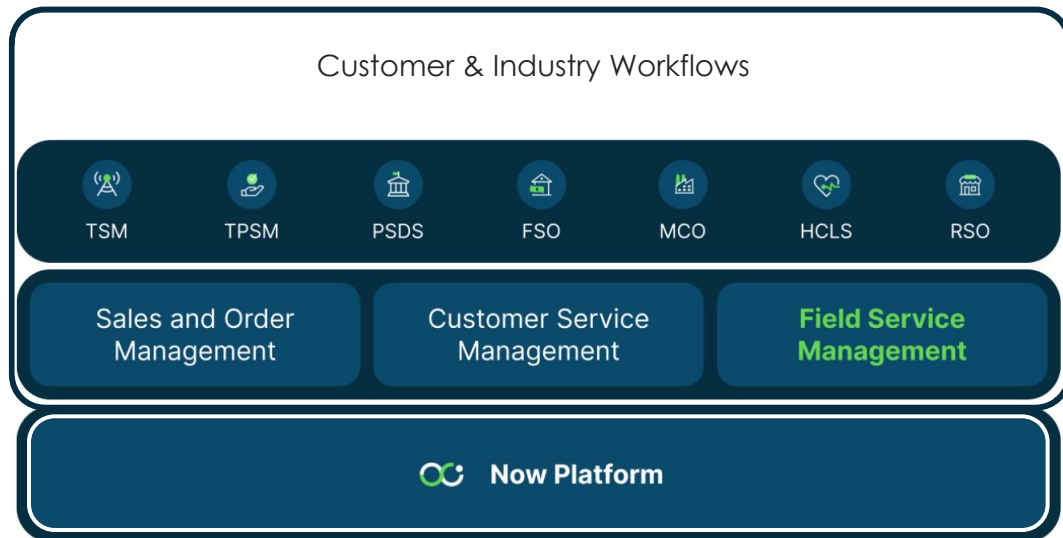
Enablement:
Democratized Knowledge and Learning

Tracking:
Unified Impact Tracking

What is FSM?

Field Service Management (FSM)

Field service management (FSM) is the coordination of a company's resources, including employees and equipment, in work activities and operations off company property.



- Outcome
- Overview
- Process
- Impact
- Reflections



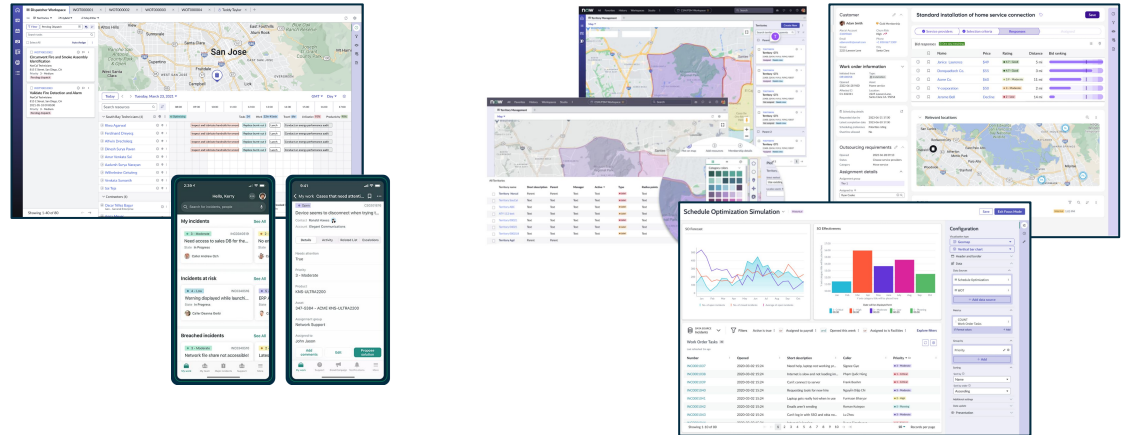
Outcome:

Influenced **executive-level roadmaps and short and long term strategies** by leading cross-functional partnerships, conducting foundational studies, and uncovering product opportunities, ultimately resulting in a **significant FSM Portfolio expansion, and increased adoption.**

Core FSM 2021 → 2022 - 2024 expansion

- Dispatcher Workspace
- Mobile FSM Agent

- Field Service Marketplace
- Field Service Territory Planning
- Capacity and Reservations Management
- Field Service Planner Workspace
- FSM Workplace Modularity / Contexts



Overview

Context:

Challenge: In 2022 ServiceNow Field Service Management (FSM) was recognized in the Gartner Magic Quadrant as a niche player, but acknowledged as having potential for growth.

Goal: To better compete with established leaders like Salesforce, ServiceNow aims to **expand core FSM capabilities with a focus to empower “planners”**, streamline existing workflows, and ultimately drive adoption.

Stakeholders:

- Sr Director of Product Management
- Sr Manager of Product Design
- Sr Director of Engineering

Risky Unknowns and Assumptions

- **Assumption:** To expand our portfolio, we believe we should focus on the "planner" persona.
- **Unknown:** We need to clarify whether "planners" have a narrow focus (regional managers improving operations within a single region/business unit) or broader responsibilities as designated roles.
- **Unknown:** We lack a comprehensive understanding of the target users' needs and pain points, and this limited foundational knowledge prevents us from confidently defining and aligning on a long-term UX and IA strategy.

My Role:

- Lead Researcher

Timeline:

- Feb - June 2022

Process:

Re-defining the problem

I had to dedicate time to clarify the ambiguity surrounding the "planner" personas. Initially, there was a lack of consensus and shared understanding regarding why we should focus on their specific needs.

I asked:

Why Planners?

1. What is their significance?
2. What do we already know about their roles?
3. What specific decisions do we need more confidence around?

Foundational knowledge Gaps:

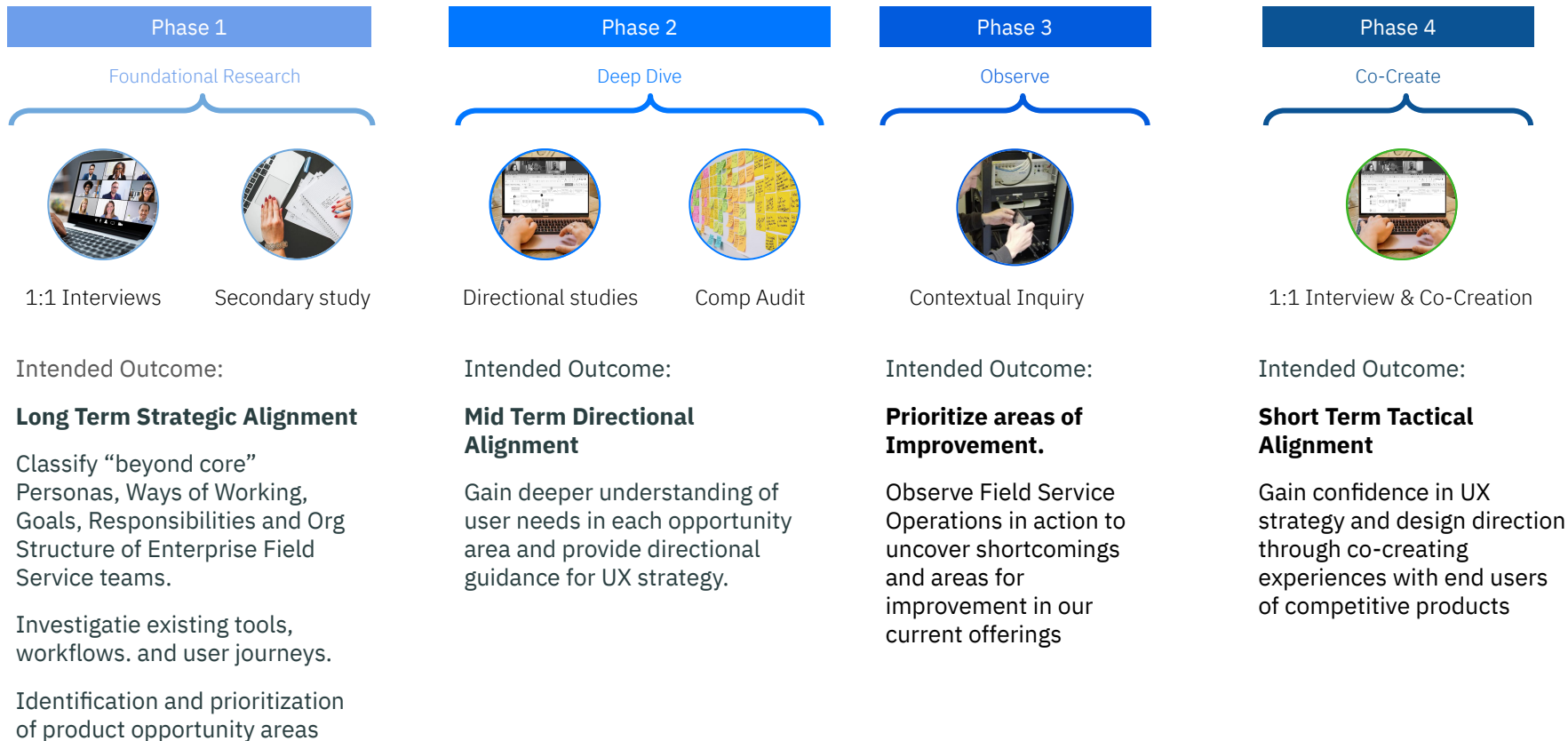
1. Where does our team lack foundational knowledge in? Who is experiencing this?

I learned:

Fundamental knowledge regarding FSM Ops was not systematically gathered and disseminated.

1. While the PM possessed extensive foundational knowledge and potential opportunities, this information was fragmented and lacked documentation.
2. The design team faced challenges in consolidating these insights, hindering their ability to grasp the full scope of user needs. This, in turn, made it difficult to formulate a comprehensive long-term UX strategy

Process: Proposed a long term research design



Process: Received buy-in to kickoff a foundational research

Phase 1

Foundational Research



1:1 Interviews



Secondary study

Intended Outcome:

Long Term Strategic Alignment

Classify “beyond core” Personas, Ways of Working, Goals, Responsibilities and Org Structure of Enterprise Field Service teams.

Investigate existing tools, workflows. and user journeys.

Identification and prioritization of product opportunity areas

Phase 2

Deep Dive



Directional studies



Comp Audit

Intended Outcome:

Mid Term Directional Alignment

Gain deeper understanding of user needs in each opportunity area and provide directional guidance for UX strategy.

Phase 3

Observe



Contextual Inquiry

Intended Outcome:

Prioritize areas of Improvement.

Observe Field Service Operations in action to uncover shortcomings and areas for improvement in our current offerings

Phase 4

Co-Create



1:1 Interview & Co-Creation

Intended Outcome:

Short Term Tactical Alignment

Gain confidence in UX strategy and design direction through co-creating experiences with end users of competitive products

Process: I used an iterative and flexible approach in this research.

1. I interviewed internal **stakeholders and SMEs** to shape my research protocol.
2. I started fielding with **6 participants** taking a grounded theory approach.
3. Based on **identified knowledge gaps** I gradually added more participants, expanded on the scope and improved questions.
4. I ended up with **24 participants** and a moderate expansion of the research scope and extended timeline.

Why?

To address my team's critical need for a deeper understanding of this complex field, I iteratively adapted my research approach. This allowed me to bridge the gap in foundational knowledge around enterprise-level field service operations.

This iterative process was highly collaborative with Design, PM and Eng participation.

Process: Screening, recruiting and setup

Screening Criteria:

- FSM experts that currently hold middle or back office roles in an enterprise scale organization.
- Responsible for planning, scaling and optimizing the field service operations.
- Preferably within Telco and Manufacturing sectors

Recruiting channels:

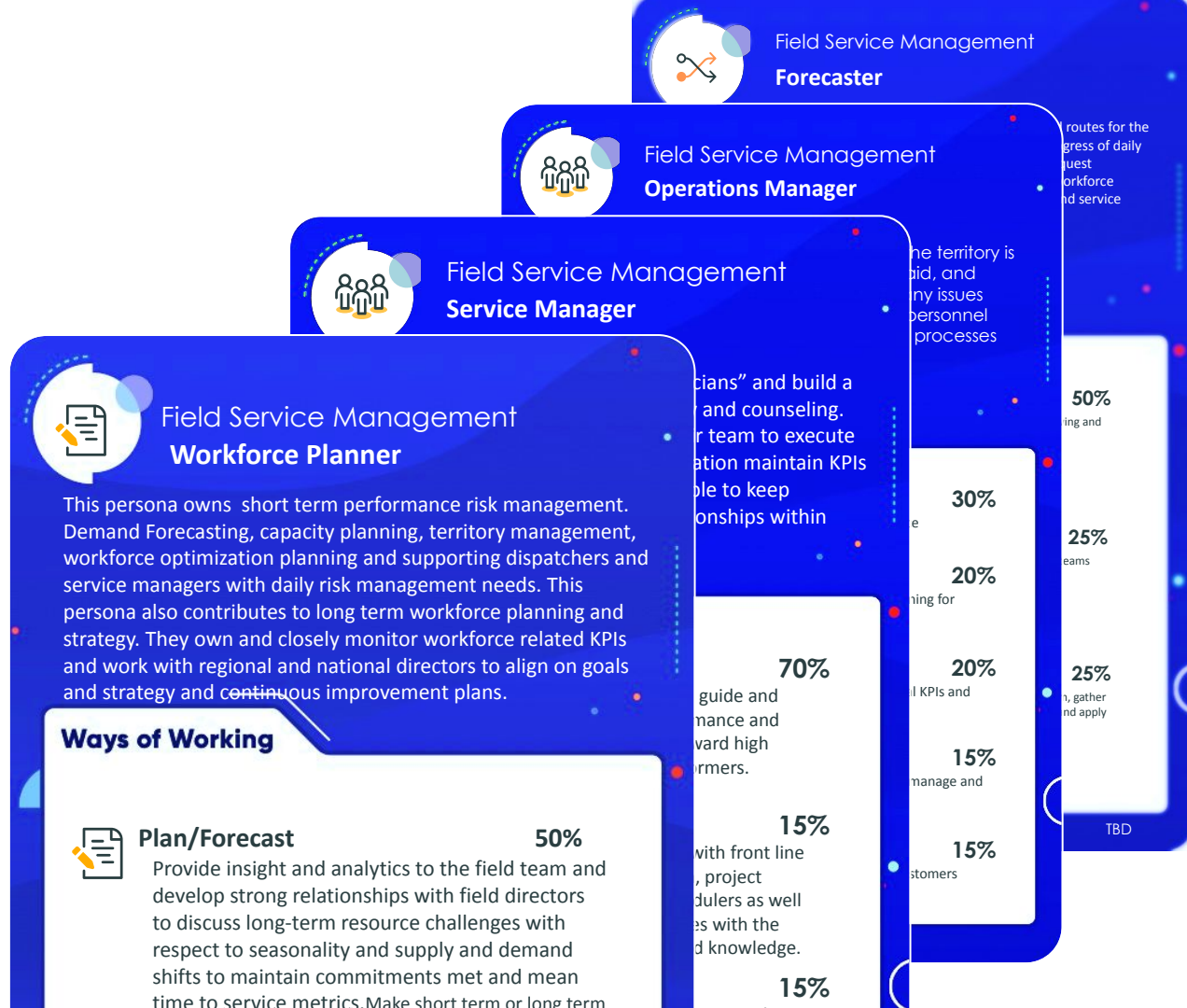
- Internal solutions consultants connections with existing customers
- UserInterviews platform
- LinkedIn outreach

Setup

- 24 90 minutes 1:1 Interviews were conducted over zoom
- Throughout the research process, I conducted secondary research to refine the protocol and gain deeper insights.
- Some of the participants were re-engaged to evaluate research artifacts

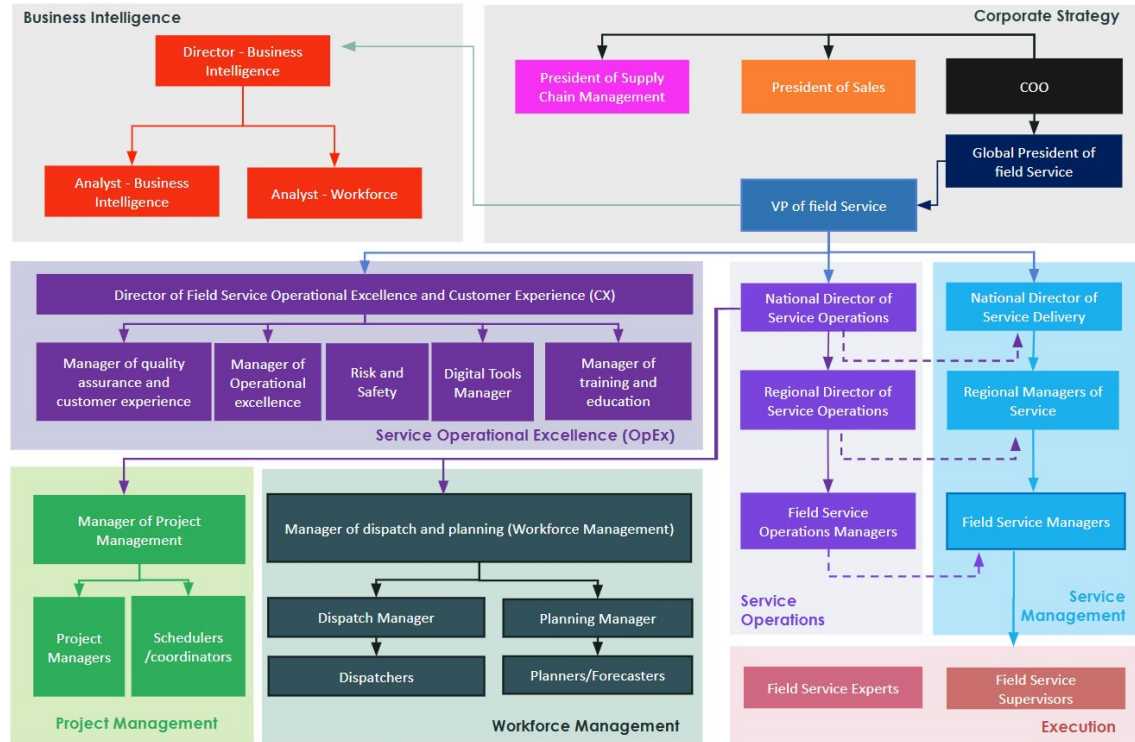
Added 6 new **FSM Persona Archetypes** to our library (Including 3 types of Planners)

These Persona Archetype Cards are used by Product, Design, Sales and Marketing for a variety of purposes including IA strategy, Content documentation restructuring, Sales enablement content and more.



Process:

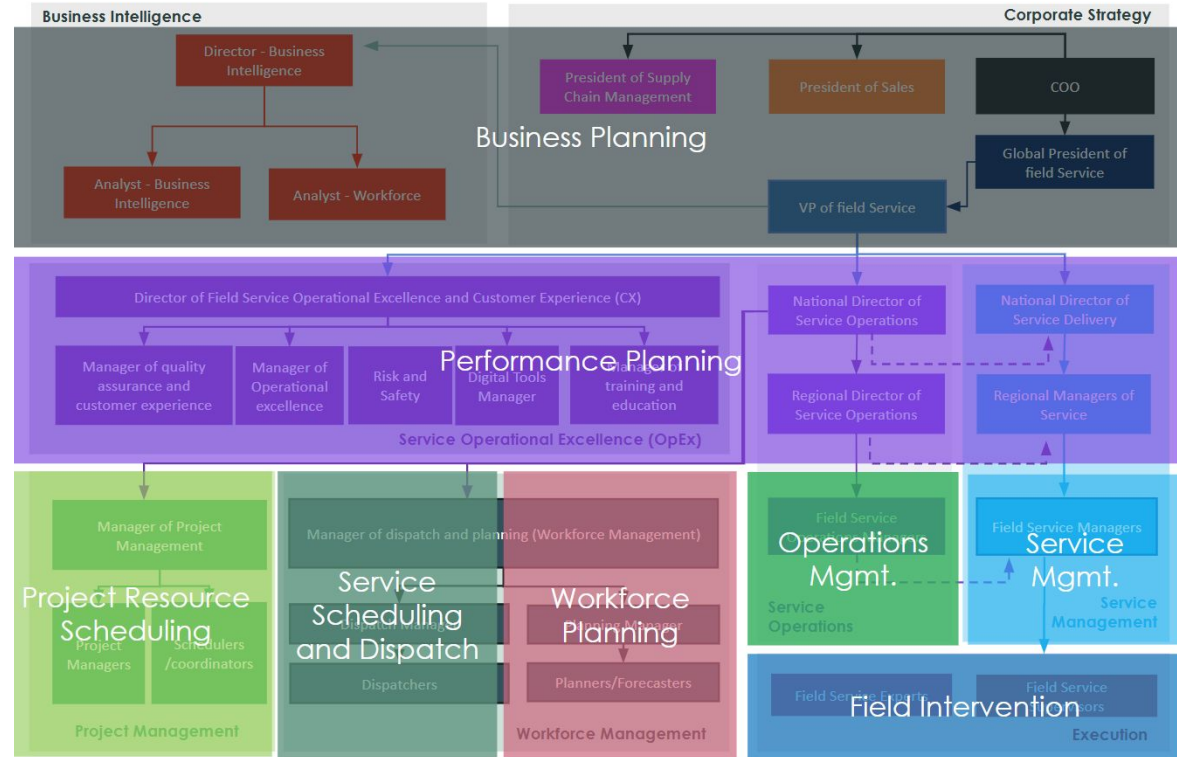
To define FSM personas,
I generated a
representative FSM Org
Structure and all
relevant functions



Process:

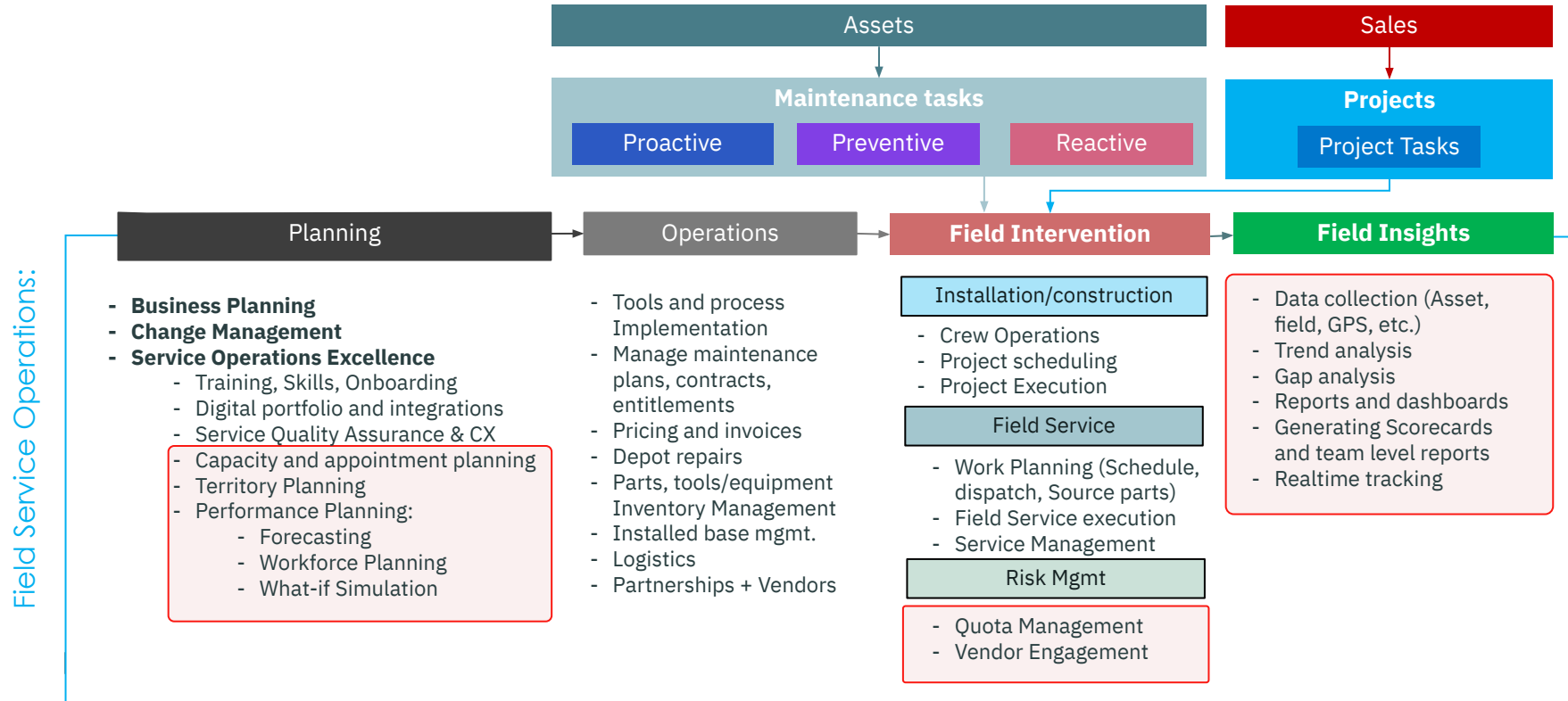
To define FSM personas,
I generated a
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Structure and all
relevant functions

I then translated these
functions into FSM
PErsona Archetypes



Process:

Mapped out the end to end field service operations flow and identified competitive opportunity areas relevant to “planners”



Example of Impact:

Insight: All 3 major FSM Ops models (customer, asset or outcome centric) can be present within the same Dispatch and Support group in the same organization depending on which business priorities each team is supporting.

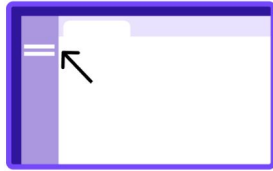
Why does this matter?

By shifting our approach from focusing on providing an optimal experience for all 3 identified operations models in one canvas to **building context specific and modular experiences** called **“Context”** we are able to support various customer business needs without cluttering and sacrificing the usability of one canvas.



Experience

Unique way of working + unique primary table = L1



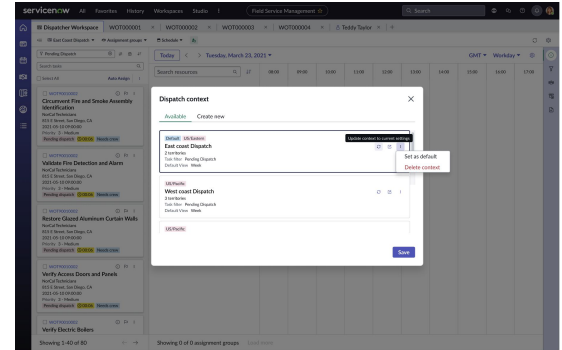
Workflows

Same way of working but diff secondary table = L2



Context

Same way of working and same tables (but diff user context) = saved view (templated view)



Example of Impact:

Insight: Depending on the business model, industry and context specific roles wore a different persona “hat” at different times

Why did this matter?

We were able to **develop a scalable long-term IA and UX strategy** to support the expansion of our product portfolio by shifting our focus from serving specific roles or personas to **aligning with the primary ways of working (WoW)**

Examples of roles

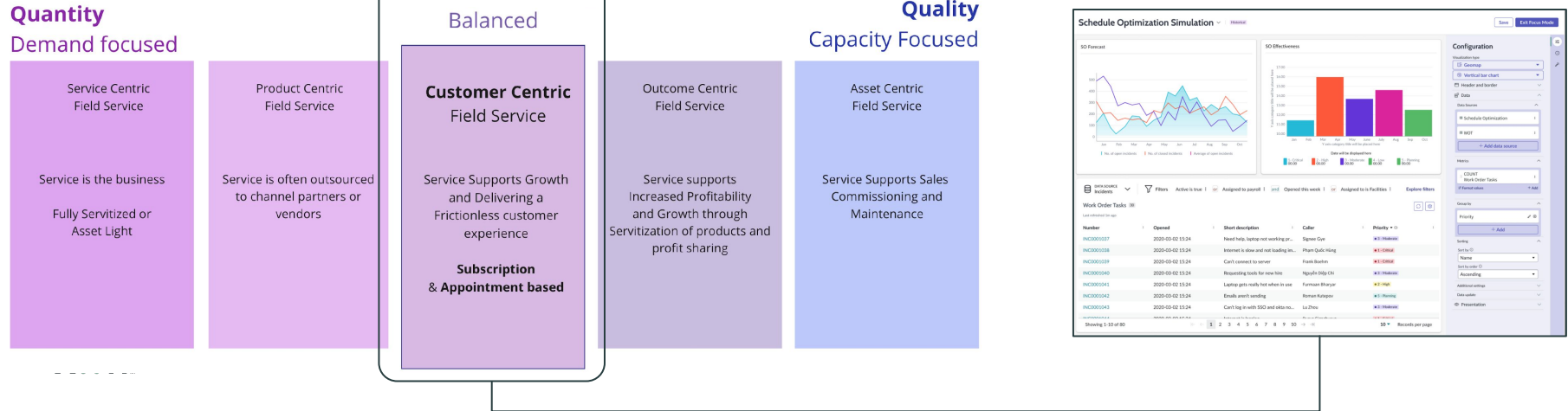
Primary WoWs	Manage Relations	Manage Process	Manage Teams	Manage Relations	Manage Relations	Manage Teams	Manage Relations	Manage Relations
	Lead Business	Analyze/Audit	Analyze/Audit	Analyze/Audit	Get help/ Need Something	Manage Relations	Analyze/Audit	Get help/ Need Something
	Plan/Forecast	Plan/Forecast	Plan/Forecast	Plan/Forecast	Triage/Disposition	Triage/Disposition	Manage Teams	Triage/Disposition
Persona Archetypes	Business Planning	Performance Planning	Operations management	Workforce Planning	Project Coordinator and Scheduler	Resource Scheduler/ Dispatcher	Service Management	Technician
Technician/Engineer								
Dispatcher Level 1								
Dispatcher Level 3								
Service Manager								
Regional Service Delivery Mgr								
Project Scheduler								
Forecaster								
Quota analyst								
Service Operations Manager								
Regional Director of Service Ops								
Operations Excellence Director								
National Director of Service Ops								
VP of Service Ops								

Example of Impact:

Insight: Enterprise-scale field service organizations that offer **subscription-based services** and **rely on field appointments to start and maintain service** often incorporate a workforce planning function within their dispatch group. This function, however, frequently grapples with **excessive task-switching** and a **shortage of purpose-built tools**.

Why does this matter?

By highlighting competitive opportunities and evangelizing the unmet user needs in appointment centric dispatch groups, I helped shape the product, and UX strategy for the **launch of a new FSM “Planner” canvas**.

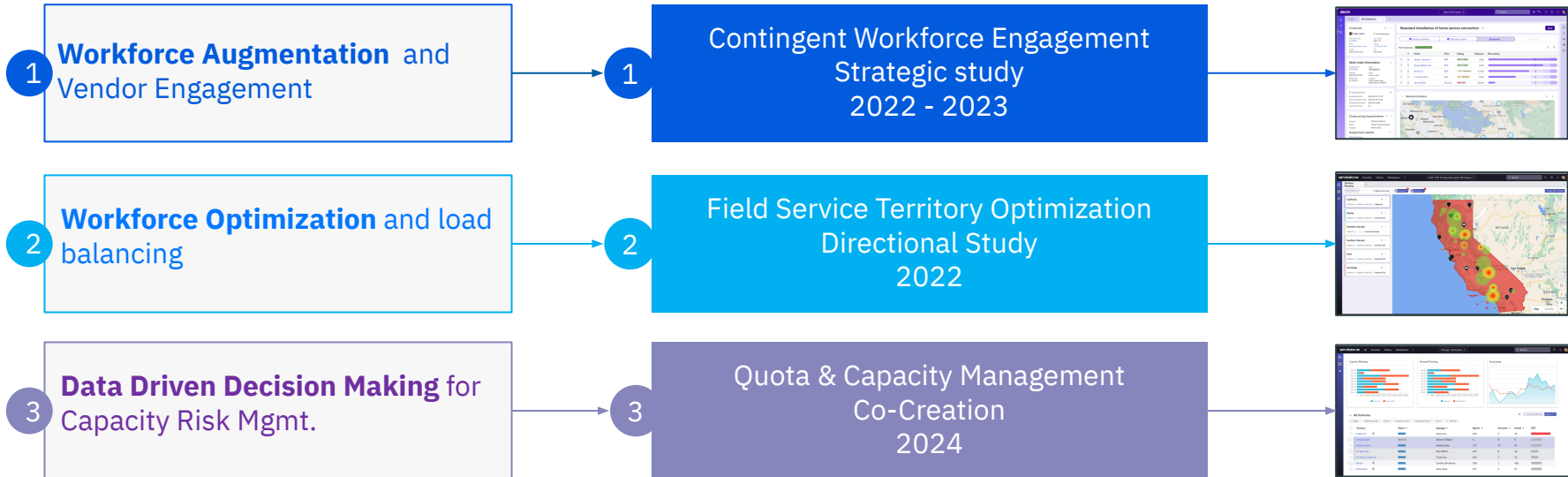


Example of Impact:

Identified and explored 3 major Field Service Operations Challenges that can serve as **product opportunity areas** for ServiceNow:

Following 3 macro level research studies were then conducted to further inform UX strategy in those areas:

Product Impact:
3 new capabilities added to FSM portfolio.



Partners Reflections

Resulted in confidence and alignment:

“ Your research has made us more confident in our efforts. You delivered 'proof points' to share across, and better educate, PM, Design, Development, Marketing, Sales, and even partners.

Your work has helped us to better where we have potential to differentiate.

Product Management Director

“ Your research is both validating to our roadmap as well as adding essential texture to how we build features for the immediate releases and how we organize them within our shipped experiences moving forward.

John H. - Manager, Product Design - FSM Design

Influenced beyond Product

“ Your research is key to our marketing strategy because it helps us understand the personas and their needs so we can better showcase our products and further refine our messaging to stay relevant.

Director, Product Marketing, Field Service Management

“ The result will be a not only a superior product but also a more tailored messaging that raises our credibility in talking to prospects, customers and industry analysts.

Product Management Director

Partner Recognitions



Snehal Ghag gave Kudos! to Maral Elliott

November 20 at 03:52 AM

Maral was recognized for "Create Belonging."

Maral,

You are one solid support to the FSM team. I want to thank you for all the research efforts you have been running and done before. This has helped us focus on all the right things. FSM Research is an ocean and how well you help us sail through. Especially for territories, I really appreciate your strong backbone in answering all-important questions and sharing customer quotes. Also, all your actions are remarkable enabling the design team in usability tests, involving the design team in UXQs and arrange IDC-friendly user interviews. This totally makes us feel belong to one team, one vision. I look forward to working with you more and learning from you.



Lois Shank gave Kudos! to Maral Elliott

March 5 at 09:21 PM

Maral was recognized for "Wow Our Customers." 🎉

Maral has been a huge help to the FSM writers in our content restructuring project. She reached out to her contacts and helped us get some valuable external stakeholder feedback on our proposed restructure which led to some great improvements in our proposed outline. We are so excited to deliver the first phase of the new structure in the Washington release, and we could not have done it without Maral!



Thank you

Appendix

Influenced UX and IA Strategy for expansion of FSM Capabilities

