



ONE PLATFORM. THREE PLAYS. EVERY INDUSTRY OUTCOME.

*How Sutherland helps enterprises turn ServiceNow into
an autonomous, customer-connected, and industry-
ready enterprise platform*



The ROI Ceiling Nobody Budgeted For

Most large enterprises did not set out to build a ticketing system. They set out to build a platform that would run IT, HR, and customer service from a single system of action, and for a while, ServiceNow delivered on that promise. Deployments went live, tickets moved faster, and dashboards looked healthier than the spreadsheets and email chains they replaced.

Three or more years in, a different pattern shows up. The instance that once felt clean now carries years of customization nobody fully remembers approving. Customer-facing case management still runs alongside, rather than inside, the operational workflows that actually fix problems. And processes that are unique to a given industry, such as clinical intake, dispute resolution, or supplier lifecycle management, have been forced into horizontal IT service management and customer service management configurations that were never designed for them.

None of this would matter as much if the platform's own roadmap were standing still. It isn't. ServiceNow is moving quickly toward Now Assist, AI Agents, and agentic automation, and enterprise investment is following it.





The problem is that spending has outrun readiness. The same research found that only 16% of organizations have replaced fragmented legacy systems with an integrated foundation, and just 26% have the governance systems needed to manage AI safely at scale. Put simply, most enterprises are buying a Formula 1 engine and bolting it onto go-kart infrastructure. Agentic AI and Now Assist get layered onto an instance that was never cleaned up, rather than built on one that was.

This is the moment that matters for anyone responsible for a ServiceNow estate. The gap between what the platform can now do and what most organizations' cores can safely support is widening, not narrowing, and it is widening at exactly the point where competitors who close it first will pull meaningfully ahead.

The implications reach beyond IT. Operationally, an unmanaged core means every upgrade cycle takes longer and carries more risk, and every new automation project inherits the fragility of what it is built on. Financially, technical debt is not a one-time bill. It is a recurring tax on IT budgets that grows with every quarter it goes unaddressed, and it competes directly with the funding leaders would rather spend on the AI initiatives their boards are asking for. Strategically, the organizations that resolve this gap first end up positioned to adopt agentic AI safely, while competitors are still explaining to their own boards why last year's AI investment hasn't produced the workflow transformation it was supposed to.

Three Signals Pointing to the Same Root Cause

Across industries, ServiceNow customers keep running into the same three pain points, and ServiceNow's own primary research confirms all three independently of any vendor's sales narrative.

A fragmented, legacy-burdened core is blocking AI-ready operations.

As noted above, only 16% of organizations have replaced fragmented legacy systems with an integrated foundation. This compounds a problem ServiceNow has flagged directly to its own customer base: unmanaged customization and accumulating technical debt slow every upgrade cycle and put safe adoption of Now Assist and AI Agents at risk. That same ServiceNow analysis cites Forrester's prediction that more than half of technology decision-makers would see their technical debt rise to a moderate or high severity level in 2025, climbing to roughly three-quarters by 2026. A brittle core does not stay brittle quietly. It becomes the ceiling on everything built above it.

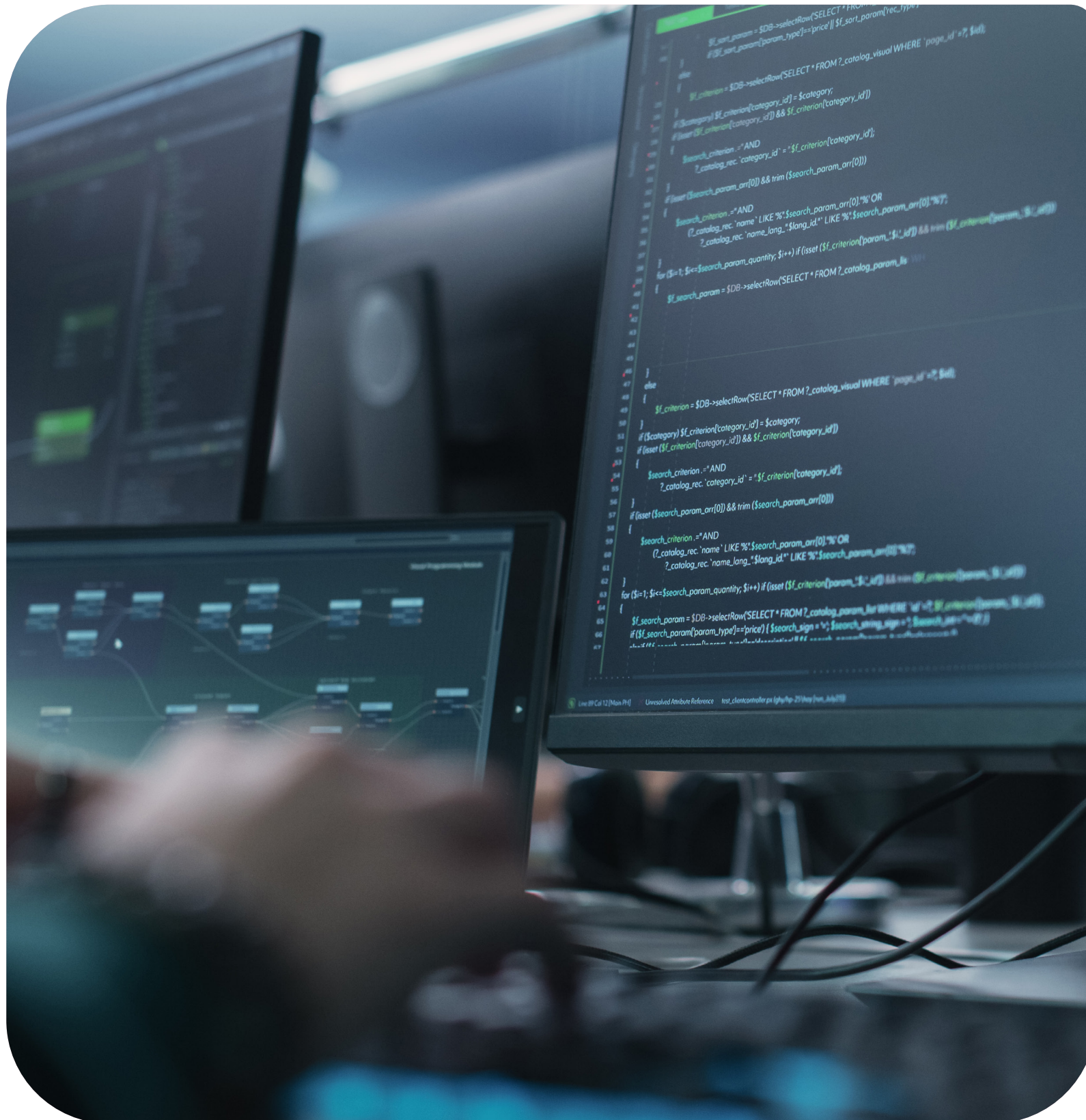
Disconnected service channels are costing satisfaction and rep productivity.

ServiceNow's global customer experience (CX) study, which surveyed more than 27,000 customers, 3,500 service representatives, and 3,900 executives, found that service reps spend less than half of their day, just 45%, actually helping customers, because they are toggling across three to five disconnected systems to do it.

On the customer side, half of those surveyed say a lack of empathy is their single biggest frustration with service interactions, yet only 23% of executives treat empathy as a priority, a disconnect ServiceNow's researchers call the empathy gap. The commercial stakes of getting this wrong are not abstract. McKinsey's analysis of customer experience leaders in the United States found they achieved more than double the revenue growth of CX laggards over a multi-year period. Fragmented CX is a revenue problem, not merely an operational inconvenience, and it shows up directly on the top line.

Agentic AI adoption is outpacing safe, scaled deployment.

But adoption has outrun orchestration. Only 18% are scaling agentic processes across key functions, and the share of organizations that have streamlined cross-functional workflows with AI actually fell, from 30% in 2025 to just 16% in 2026, as fragmented platforms accumulate a new layer of disconnected AI agents on top of already-siloed systems.



Most deployments remain isolated pilots rather than governed, production-ready operations.

Together, these three signals explain why so many ServiceNow estates plateau at what we call the Optimized stage: automation layered on top of core processes that remain reactive, disconnected, and generic, never reaching the autonomous, industry-aligned operations the platform is capable of supporting.

Why More Automation Isn't the Answer

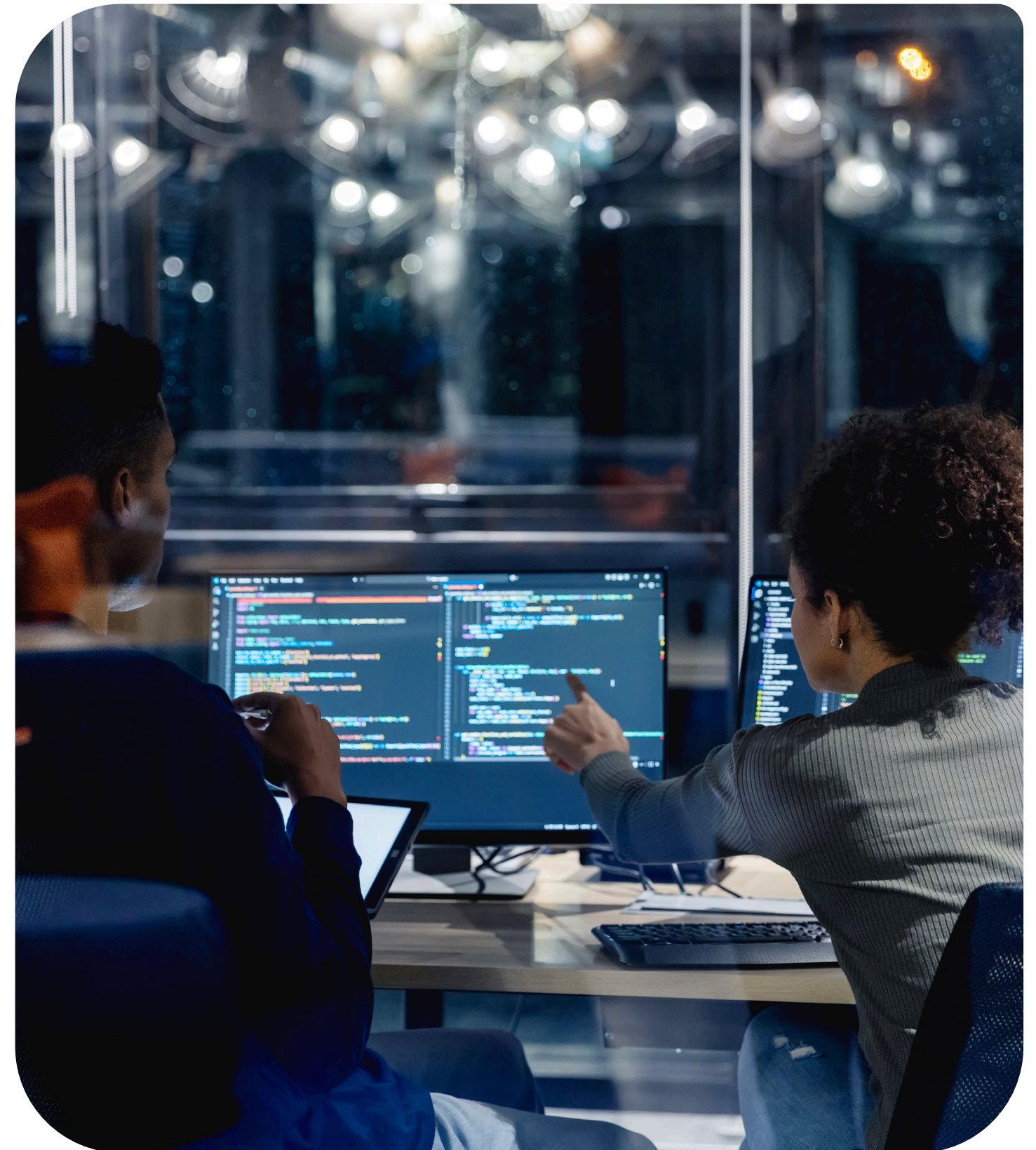
It is tempting to respond to this plateau with more of the same medicine: another automation project, another chatbot, another point solution bolted onto the instance. That instinct is understandable, and it is also the wrong move for most organizations.

The reason is straightforward. A customer drowning in ticket volume and technical debt does not need more automation. It needs a clean, governed core before anything else, because automation built on a fragile foundation simply automates the fragility faster. A customer losing customers to fragmented service does not primarily need another AI feature. It needs connected case management and channels before it needs more intelligence layered on top of a broken journey.

And a customer forcing industry-specific processes, such as claims adjudication or network service assurance, into a generic IT service management (ITSM) or customer management (CSM) configuration does not need further customization of a horizontal tool. It needs purpose-built workflows designed for that industry from the start.

We believe the return on a ServiceNow investment is unlocked not by deploying more modules, but by matching the right outcome-led play to where a customer's estate and ambition actually sit today. Treating these as three separate, sequenced plays, rather than one generic transformation program, is what lets organizations reach autonomous, self-healing operations without losing momentum along the way.

This is also why so many well-intentioned transformation programs stall. A program that tries to modernize the core, connect the customer experience, and roll out industry accelerators all at once, using the same generic methodology for each, tends to under-deliver on all three. Core modernization has different success criteria, timelines, and stakeholders than CX transformation, and industry workflows require domain expertise that a horizontal implementation team often doesn't have. Sequencing the plays deliberately, starting with the one that addresses the organization's most pressing constraint, is what keeps a multi-year program from collapsing into a multi-year cost center.



A Framework Built on Where You Actually Stand

Sutherland's ServiceNow practice is organized around three outcome-led plays. Each one starts from a business result the organization actually wants and works backward to the ServiceNow configuration that delivers it, rather than starting from a generic implementation checklist.

Autonomous Operations

Core modernization is the right starting point for enterprises that have run ServiceNow for three or more years, carry heavy customization and high ticket volumes, and have near-term plans to adopt AI Agents or Now Assist. The work begins with a configuration and technical-debt health scan, followed by instance cleanup that retires unused workflows, tables, and integrations. From there, the play builds a migration path to Now Assist and AI Agents, agentic workflows for autonomous Tier 1 and Tier 2 resolution, and a governance framework for safe AI agent rollout. Sutherland designs this play to deliver up to a 40% reduction in manual ticket handling and twice the workflow deployment speed.



CX Transformation

Modern CRM fits service-led B2B and B2C organizations that are moving off legacy CRM or supplementing it with connected, ServiceNow-powered service delivery. This play unifies case management across CRM and service functions, adds omnichannel self-service and proactive engagement across chat, portal, and voice, connects front-, middle-, and back-office workflows, and builds a customer 360 view spanning sales, service, and operations. Sutherland designs this play to deliver 20 to 30% faster case resolution and up to a 15-point improvement in customer satisfaction (CSAT).

Industry Workflows

Vertical Solutions serve enterprises in regulated or operationally complex industries that want pre-built, compliant workflows instead of custom development. Sutherland has built purpose-built accelerators across healthcare and life sciences care coordination, financial services onboarding and dispute and regulatory-compliance workflows, telecommunications order management and service assurance, manufacturing supplier lifecycle and plant or asset uptime, retail service management for stores and supply chains, and public sector citizen service and compliance readiness. The play is designed to reach value faster than a custom build would allow, across all six industry accelerators.

What differentiates this approach is the ability to run all three plays as one continuous engagement. A customer that starts with core modernization can move into CX transformation or industry workflows without a re-scoping exercise, because the same team carries the context forward. That continuity matters more than it might seem. Re-scoping a transformation program every time the focus shifts is where momentum, and often budget, gets lost.



From Framework to Outcomes

To see how the sequencing works in practice, consider an organization facing all three pain points at once, such as a midsize insurer running ServiceNow across IT, claims, and customer service. This scenario is illustrative rather than a documented case study, but it reflects how the three plays are designed to work together.

Where Autonomous Operations applies, the engagement typically begins with a technical-debt health scan, retiring unused workflows and integrations while building a governance framework for AI agent rollout. Within roughly four months, this can bring an instance to a state clean enough to support agentic workflows for Tier 1 and Tier 2 resolution, in line with the reduction in manual ticket handling and faster workflow deployment this play targets.

Where CX transformation applies, once a stable core is in place, the organization is well positioned to unify case management across functions like claims and customer service, layering in omnichannel self-service on top of the cleaned-up platform rather than on top of the fragmented one it replaced. Where industry accelerators apply, as the platform matures further, functions that had been forced into generic ITSM workflows, such as supply and vendor operations, can adopt industry accelerators like supplier lifecycle management to reach value faster than a custom build would allow.

Core modernization creates the clean, governed foundation the other two plays depend on. CX transformation and industry workflows then convert that foundation into value that customers and the business can actually feel.



Business Impact by Play

Play	Specific benefits	Business impact
Autonomous Operations	Up to 40% reduction in manual ticket handling; 2x faster workflow deployment	Frees skilled resources for higher-value work and de-risks the path to agentic AI
CX Transformation	20-30% faster case resolution; up to +15 points CSAT improvement	Protects the customer experience and reduces the revenue impact of poor service
Industry Workflows	Faster time-to-value than custom builds, across six verticals	Meets regulatory and operational requirements without bespoke development risk

By embracing the right play at the right time, enterprises reduce cost to serve, protect customer satisfaction, and reach industry-ready operations without the risk of a bespoke build, while positioning the platform for safe, governed AI agent adoption.



What Leaders Should Do in the Next 90 Days

The question with ServiceNow is rarely whether to invest further. It is which play unlocks the most value next, and getting that sequencing wrong is an expensive way to find out.

We recommend every ServiceNow conversation start with a short, structured assessment rather than a proposal for more modules. Three moves make that assessment useful rather than academic.

First, run a configuration and technical-debt health scan to establish where the instance actually stands today, not where the original implementation plan assumed it would be. Second, map current ticket, case, and channel data against the three plays to identify the highest-value starting point for this specific organization, since the right entry point for an insurer carrying claims volume looks different from the right entry point for a telecom operator managing service assurance. Third, leave the conversation with a scoped next step, whether that is a blueprint, a pilot, or a working session, booked on the calendar rather than left as a follow-up action item.

Acting now matters because the cost of waiting compounds quietly. Every quarter spent on an unmanaged core is a quarter of technical debt compounding further, and every quarter of disconnected CX is a quarter of avoidable churn. Neither shows up as a single dramatic event. Both show up gradually, in slower upgrade cycles, in rep productivity that never quite recovers, and in the customers who leave without complaining first.

The Choice in Front of Every ServiceNow Customer

The future of ServiceNow is autonomous, connected, and industry-aligned. Enterprises that keep treating it as a ticketing system will keep paying the price of technical debt, fragmented service, and generic workflows, while competitors that sequence the right plays move into self-healing, agentic operations.

The question is no longer whether ServiceNow can deliver autonomous, business-aligned operations. The research confirms it can, and that AI investment is already flowing to make it happen. The real question is which play your organization leads with first, and whether that choice is made deliberately or by default.

Sutherland's ServiceNow practice exists to help leaders make that choice deliberately.

Contact Sutherland to schedule a health scan and identify the play that will move your organization furthest, fastest.

Sutherland is an AI-driven business transformation partner to enterprises, including several Fortune 500 clients. We design, run, and automate business operations at scale, helping clients improve efficiency, strengthen customer experiences, and deliver measurable outcomes.

Most companies either build AI-led capabilities or run operations. Sutherland does both. We run complex, mission-critical processes while engineering the AI-led solutions that sit within them. This closed loop helps clients move beyond AI pilots to reliable, governed outcomes that improve and scale over time.

With deep operational expertise, advanced products, platforms, and engineering, we help clients modernize operations and build future-ready businesses.

