

# JB POINDEXTER & Co

Shared Services & Outsourcing Network Conference

Orlando,  
March 2025

# Intro - Prathap Varkey

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- ❑ Located in Houston
- ❑ Joined J B Poindexter & Co, in 2021
- ❑ Worked at Accenture, Equinor & Devon Energy
- ❑ Industries : Energy, Manufacturing & Consulting
- ❑ 22 Years of Combined Experience in SSC, BPO & Offshoring
- ❑ Areas of Interest : Strategy and Transformation



Our Business



Customers



The Journey



Challenges and  
Lessons Learnt



Way Forward

# Introduction & Agenda

•**Introduction to the session:** The transformation story of JB Poindexter's shared services journey.

## What this session covers:

- ✓ The challenges of scaling shared services
- ✓ How leadership, process optimization, and efficiency drove growth
- ✓ Lessons learned and future roadmap

•**Why It Matters:** Understanding shared services as a strategic business enabler.



# JB Poindexter at a Glance

<b>About JB Poindexter:</b>	Leading automotive and manufacturing solutions provider.
<b>Scale of Operations:</b>	Global presence, multiple business units.
<b>Why Shared Services?</b>	Need for efficiency, standardization, and cost reduction.



Nine business units operating in North America forecasting \$2.5B in 2025 revenues



Seven of nine business units dedicated to transportation, representing 95% of corporate revenues



Portfolio of business units engaged in production and installation of commercial truck bodies, step-vans, service utility trucks, van bodies, funeral coaches, limousines, mid-sized buses, cargo management systems, pick-up truck caps, tonneau covers and accessories



At the seasonal peak, business units employ over 9,000 team members.

75 manufacturing plants with five million square feet of floor space

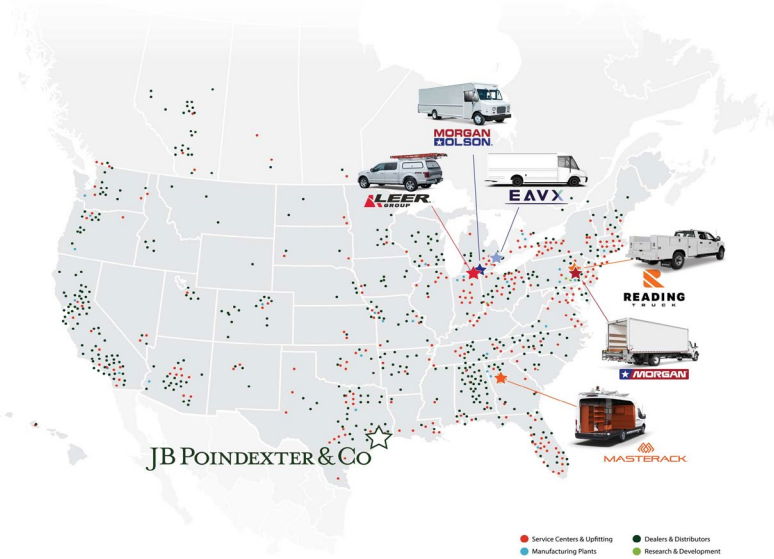
39 owned service and upfit centers

2,300 authorized dealers and distributors

Strong capital structure with excellent liquidity



# JB POINDEXTER & Co



# Customers We Serve

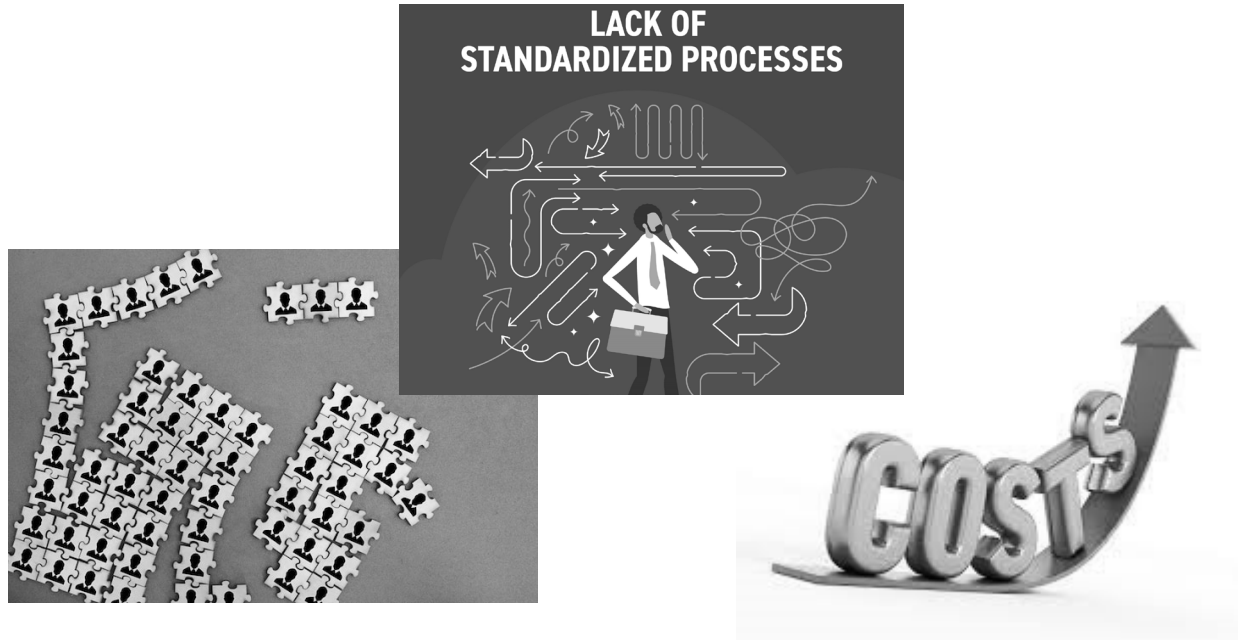
The Company's business relationships span decades with many of the largest commercial fleet customers in North America. These trusted, long-term partnerships are evidence of our commitment to quality, on-time delivery and dependable service.



# The Challenge: Why Shared Services?

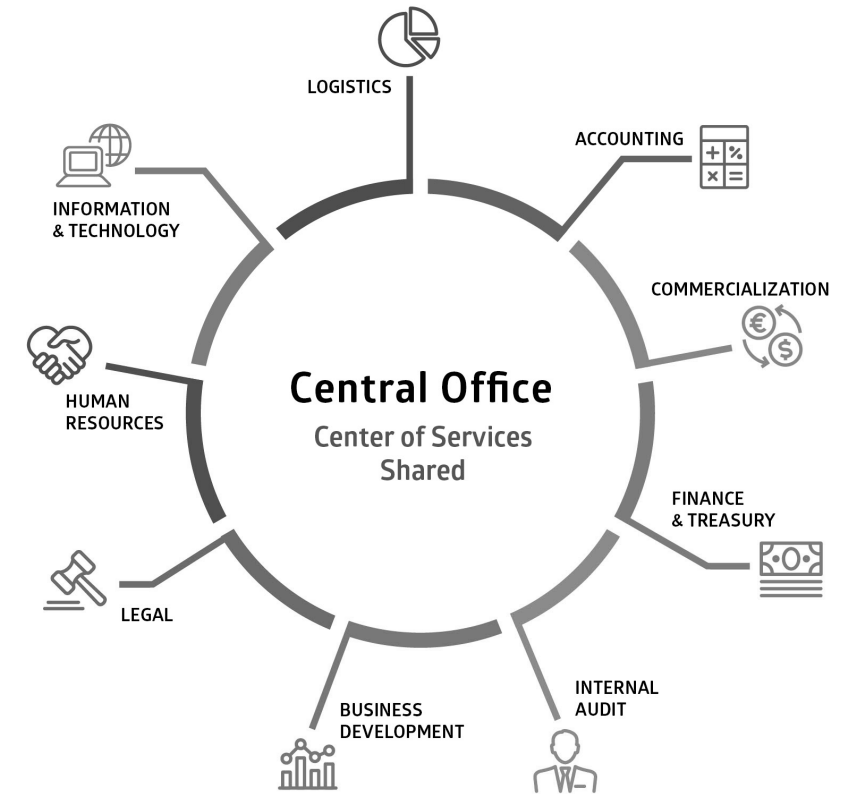
- **Initial Scenario (2021):**

- Small, fragmented team with manual processes.
- Lack of standardization across business units.
- High operational costs and inefficiencies.



- **Need for Change:**

- Establish a **scalable and standardized** shared services model.
- Improve process efficiencies through automation and best practices.



# Scope of Work

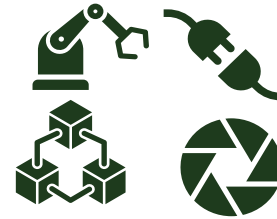
The organization is optimizing its operations through **process standardization, efficiency improvements, and cost reduction** to build a scalable and sustainable business model. By leveraging best practices, automation, and data-driven insights, workflows are streamlined, redundancies minimized, and resource utilization enhanced. The following scope was defined for the shared services function to achieve these objectives.

## IT Services Functional & Technical



- L1, L2 & L3 Incident Support for business systems
- JDE Functional & Technical, ServiceNow
- System/Process Documentation
- Project Support
- Root Cause Analysis
- 24/7 Application Support & Maintenance
- Scalable Offshore Delivery Model
- Rapid Issue Resolution
- Innovation Enablement

## Engineering Services



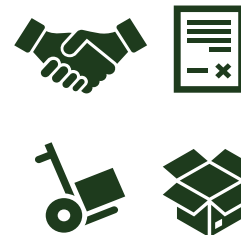
- 2D & 3D Designing
- New Product Concept Designs
- Bill Of Materials Support (BOM)
- Estimation Engineering
- Accelerated R&D & Product Development
- Cost Optimization
- Innovation Acceleration

## Business Operations Services



- Finance & Accounting
- HR Support
- Vendor Master
- Supply Chain Analytics
- Sales Order, Buyer, & Warranty Support
- PPC - Item Attribution, IMDS
- Pricing

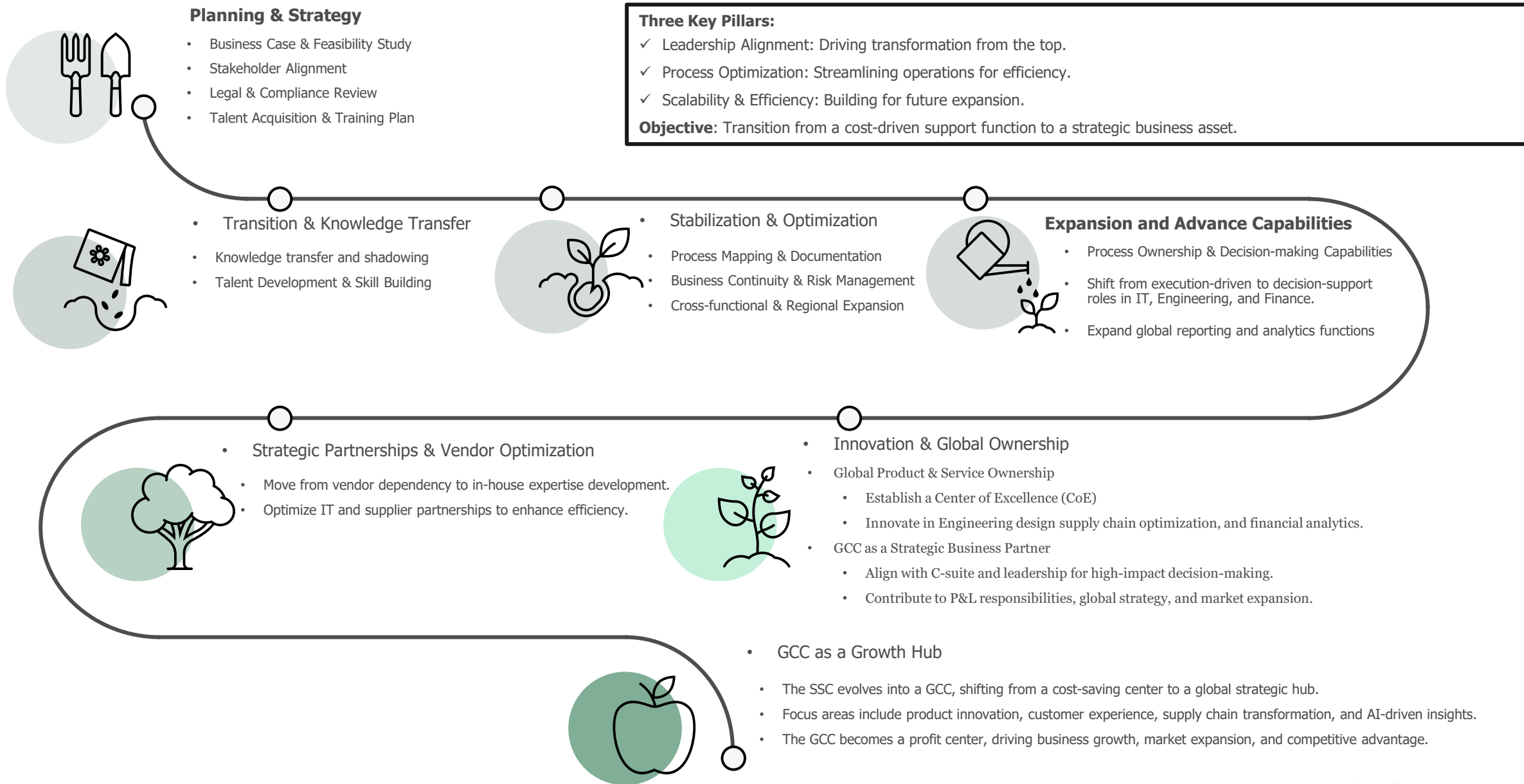
## Sourcing Services



- Strategic Sourcing & Procurement Process
- Supplier Relationship
- Contract Negotiation Management
- Cost Analysis and Savings Initiatives
- Strategic Vendor Management
- Cost Reduction & Risk Mitigation



# The Strategic Vision



# The Growth Journey (2021-Present)

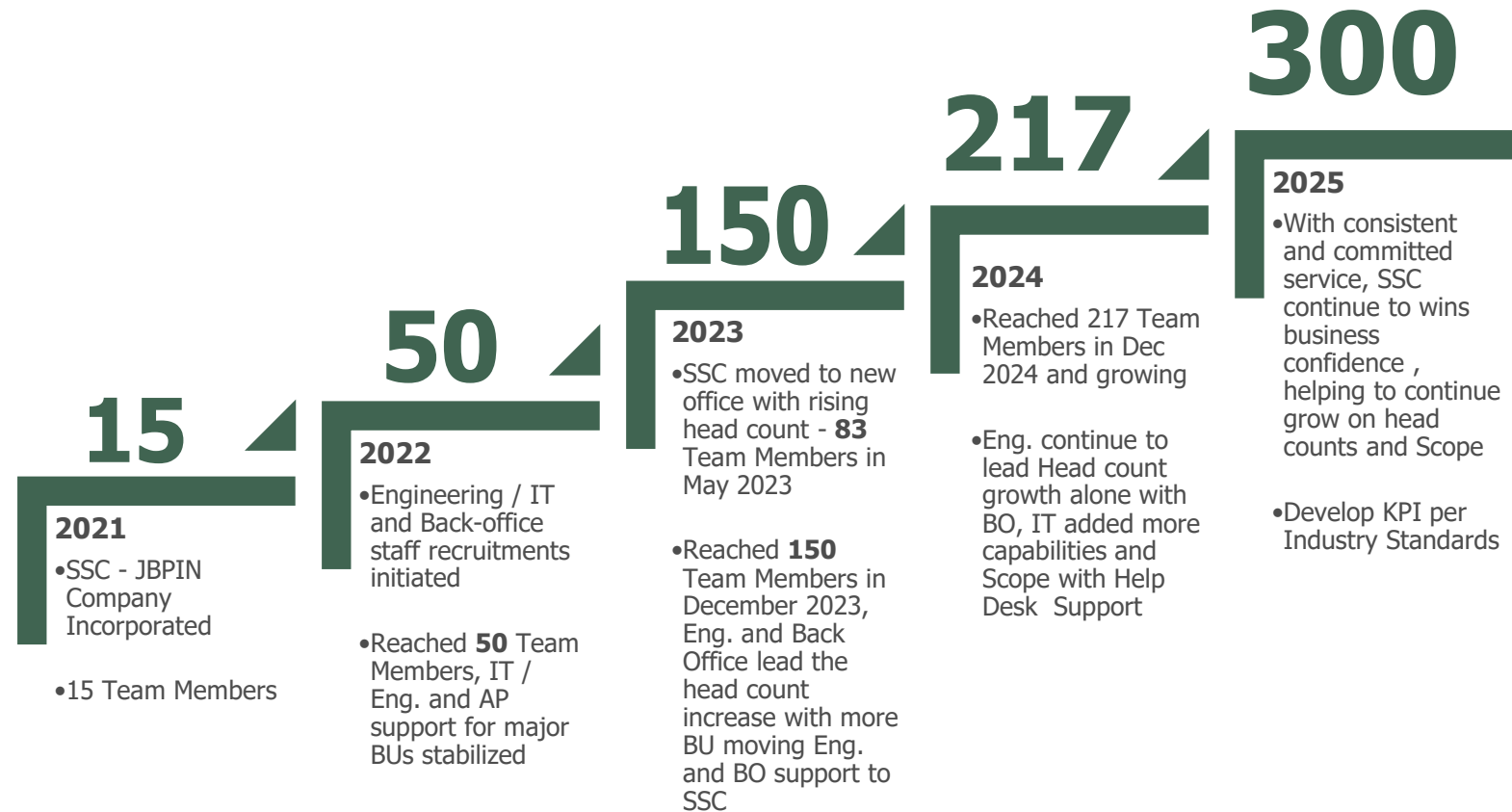
- **2021:** Small, focused team initiated the transformation.
- **2024:** Scaled to **200+ employees** through leadership support and process standardization.

- **Future Outlook:**

- ✈ **350 employees in the next 2 years.**
- ✈ **600 employees in the next 5 years.**

- **Growth Enablers:**

- ✓ Automation and digital transformation.
- ✓ Strong governance and performance metrics.



# Overcoming Challenges & Lessons Learned

## Top Challenges Faced:

- Managing rapid workforce expansion.
- Ensuring technology adoption across teams.
- Adapting to dynamic business needs.

## Key Takeaways:

- ✓ Agility in operations is critical.
- ✓ Change management is essential for smooth transitions.
- ✓ Upskilling workforce for future capabilities.



# The Impact: From Support Function to Strategic Asset

## How Shared Services is Now Adding Business Value:

- ✓ Cost reduction through efficiency improvements.
- ✓ Strategic decision-making support via analytics.
- ✓ Higher service levels and better user experience.



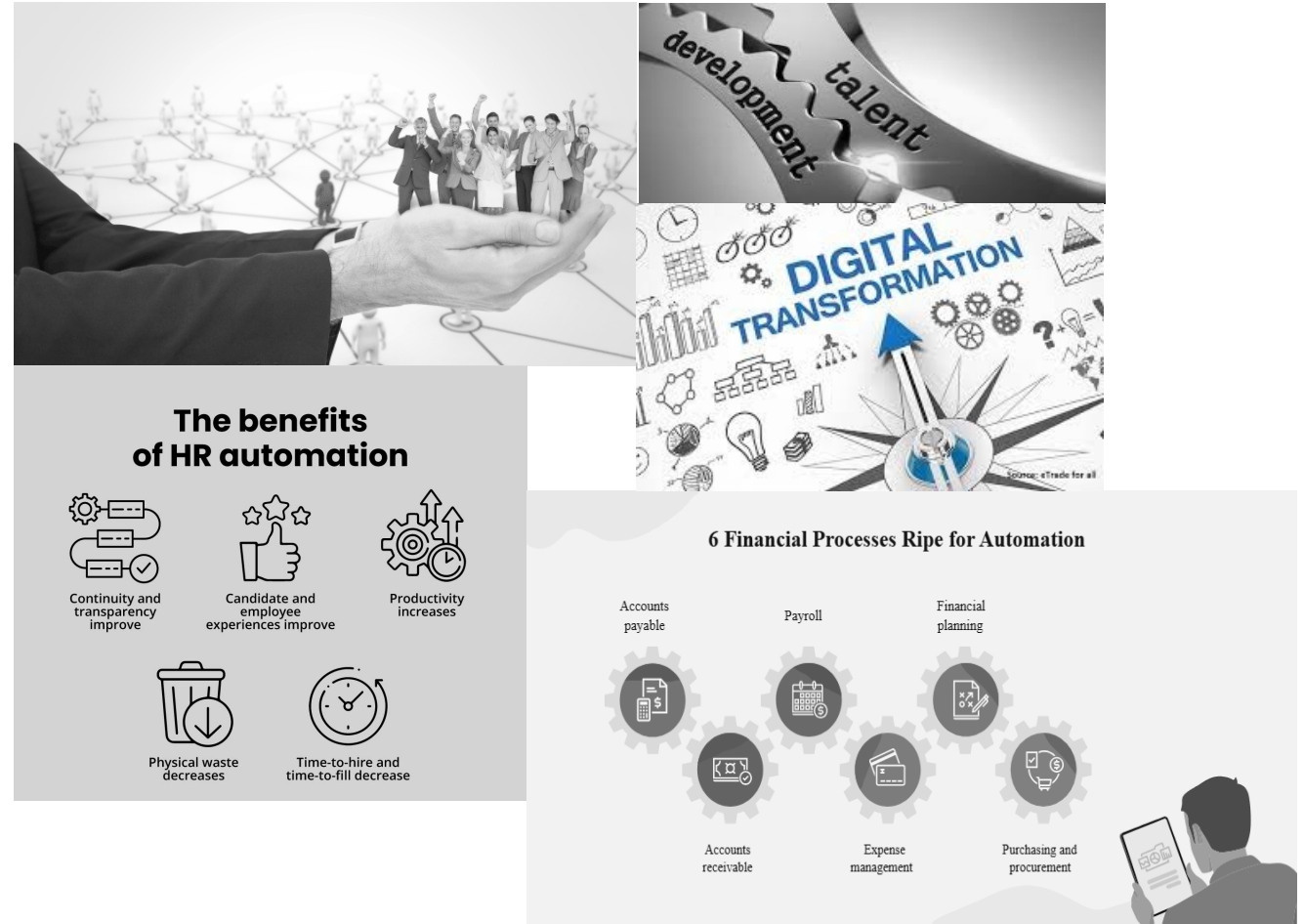
# Future Roadmap: The Next 5 Years

## Growth Goals:

- 🚀 Expanding to 600+ employees.
- 🚀 Increasing automation in finance, HR, and supply chain.

## Strategic Focus Areas:

- ✓ Innovation in service delivery.
- ✓ Global expansion of shared services.
- ✓ Talent development and digital transformation.



# Call to Action & Closing Remarks

## Key Takeaways

- **Align leadership early** to ensure sustainable growth.
- **Optimize processes** to drive efficiency and scalability.
- **Leverage continuous improvement** to evolve into a strategic business asset.

## Call to Action

- **Encouragement to adopt best practices:**
  - ✓ Leadership engagement is key.
  - ✓ Digital transformation accelerates efficiency.
  - ✓ Future-ready shared services require agility.
- **Final Thought:** "Strong foundations lead to transformational growth."



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Thank you

