

Smart. Focused. Done Right.



Chairman's Takeaways

17th Annual Shared Services for Finance & Accounting
Dallas, Texas

June 23, 2017

Governance and Global Models

- We began with one global hub, but found reasons to distribute work – *Misty, MasterCard*
 - Cost advantages in other countries where infrastructure existed
 - Advantage of proximity to customers in 80 countries
- We use a hybrid captive model in the USA and Bogota, with BPO in India and Malaysia – *Augusto, Brinks*
- Having IT in our shared services was critical to our success – *Misty, MasterCard*
- Divide the work up in the model – complex work in Local Captive, problem solving in SSC Captive, and simple work in the BPO – *Augusto, Brinks*
- Our global model requires 20 different languages to function – *Misty, MasterCard*
- Utilized India market-level pricing to motivate USA and Bogota to improve efficiency – *Augusto, Brinks*
 - Overruns are covered by corporate funding
- Costa Rica an excellent location for skill sets and price, but market saturated – *Augusto, Brinks*
- We are a technology company – *Misty, MasterCard*
- Reporting to C-suite gives you attention, access, and backing (but also more visibility/pressure) – *John, Anthem*

Shared Services Expansion

- We added HR in 2015, FP&A in 2017, and Legal is underway – *Misty, MasterCard*
 - HR has now been integrated into the global model, but still reports to CFO
 - Legal can be a good fit in shared services (onboarding, inquiries, contracts, compliance)
- Seed the shared services with people from other countries – will bring trust with them – *Augusto, Brinks*
- M&A cultures were kept intact, despite the fact Lockheed purchased Sikorsky – *Kathleen, Lockheed Martin*
 - Took much longer, but was important to preserve cultures
- We have a dedicated group to expand and implement – *Misty, MasterCard*
- Expansion continues but the foundation does not change – *Misty, MasterCard*
 - Governance, Continuous Improvement, RPA, Analytics, Performance Management Systems

Data Management

- Master data definition is a) single source of truth, b) “biblical” reference data, c) dissemination to other systems – *Jon, Cantor Fitzgerald*
- Benefits of a master data organization – *Jon, Cantor Fitzgerald*
 - Standard definitions, central savings, synchronization, quality assurance, compliance
- Steps to creating a master data organization – *Jon, Cantor Fitzgerald*
 - 1) Data inventory, 2) centralization, 3) data ownership rules, 4) dissemination



Business Intelligence and Robotics

- Meet with owners of process, data, and systems at onset of analytics project – *Aruna, MasterCard*
- Ask audit team to review business rules early in the process – *Brian, Ascension*
- We set up robots in the system as contractors – *Hillary, McKesson*
- We set up robots as existing workers that had access but did not work the process – *Brian, Ascension*
- Our RPA team trains businesses to automate – *Aruna, MasterCard*
- We reinvest our RPA savings into RPA – *Aruna, MasterCard*
- Governance role of a COE is not process identification and programming – *Derek, Automation Anywhere*
 - Error handling, audit, re-use, testing, scheduling, metrics, deployment
- RPA begins with employee idea and ends with recognition (naming of the robot) – *Aruna, MasterCard*
- Finance SMEs are responsible for maintaining the robots – *Brian, Ascension*
- As you scale larger, an RPA COE can become a bottleneck – *Derek, Automation Anywhere*
- If it comes in by form, it's the highest priority for RPA – *Brian, Ascension*
- Standardize and eliminate waste before robotizing – *Brian, Ascension*
- A robot will not make SAP or Oracle work faster – *Carola, Pepsico*
- Have to guide next generation from developing “the neatest product” to what the customer really needs – *Katherine, Areva*
- Letting everyone develop robots is not sustainable – make a “sandbox” departments can play in, but govern the move to production – *Carola, Pepsico*
- Make sure you know if it goes wrong, was it re-engineering of process or robotics – make sure you test manually – *Carola, Pepsico*
- Develop modules that are re-usable to max out robot efficiency – *Aruna, MasterCard*

Business Intelligence and Robotics (Cont'd)

- Language and currency do not affect robots – it's just moving objects and coordinates with logic – *Carola, Pepsico*
- BPO accessing your robots through Citrix takes far more coordination – screen movements can affect execution – *Hollie, Pepsico*
- We have 9 robot developers... only 2 have IT background – *Carola, Pepsico*

Customer Service and Delivery

- Dinner with a glass of wine can be more effective than a survey – *John, Anthems*
- Help people understand the “WIFM” (what’s in it for them) and align back to goals – *John, Anthem*
- We are doing more rotations between business and SS – *Katherine, Areva*
 - But, countries with “Worker Counsels” can make rotating difficult
- We are training our people to negotiate and manage stress – *Katherine, Areva*
- Avoid BPO lift and shift – think about the customer value – we ultimately brought customer touch components back in – *John, Anthem*
- Training every global SS employee on the businesses and the internal customers – *Katherine, Areva*
- We focus more attention on customer survey open-ended question responses – where they let it all out – *Brenda, Apple*
- Do not allow emails to your customers – *Katherine, Areva*

Controls

- We maintain very tight controls around the vendor master file – *Michelle, Southwest Airlines*
- “Global Processes” owns processes – process cannot be changed unless approved – *Kathy, Abbvie*
- “FirstStrike” software prevented over \$1M of erroneous invoices from being paid – *Michelle, Southwest Airlines*
- “Why can’t you do it this way?” – smoke out country regulations/laws – *Kathy, Abbvie*
- Every employee (54,000) is a potential failure point for cyber risks – *Michael, Southwest Airlines*
- Variant Desktop Procedures (vDTP) documents what countries can do outside of the norm – *Kathy, Abbvie*
- If your vendor has a prison address...well, that’s a red flag (actually happens) – *Michael, Southwest Airlines*

See You Next Year!



Brad DeMent

Chairman SSOW 2012–2017

ScottMadden Partner and GBS Practice Lead

bdement@scottmadden.com

- 20 years of shared services and GBS experience
- GBS design and implementation consultant
- RPA and AI strategy and application consultant