

# ScottMadden's Corporate & Shared Services Solutions

October 2017

Smart. Focused. Done Right.®



# Who We Are

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ScottMadden is a management consulting firm with more than 30 years of deep, hands-on experience.

We deliver a broad array of corporate and shared services consulting services—from strategic planning through implementation—across many industries, business units, and functions.

WE DO

**WHAT IT TAKES  
TO GET IT DONE  
RIGHT**

CORPORATE & SHARED SERVICES

## EXPERIENCE

Our experienced team has been a pioneer in corporate and shared services since the practice began decades ago. We employ deep, cross-functional expertise to produce practical, measurable solutions.

## SCOPE

We have completed more than 1,600 projects since the early 90s, including hundreds of large, multi-year implementations. Our clients range across a variety of industries from energy to healthcare to higher education to retail. Our areas of expertise span the spectrum of middle and back office corporate and shared services.

## SERVICES

We have helped our clients with business case development, shared services design, shared services build support, and implementation.

**Our corporate and shared services knowledge, expertise, and experience are unmatched—no other firm has helped more clients with more unique solutions.**



# Corporate & Shared Services Capabilities

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## ASSESS AND PLAN

- Strategic planning
- Feasibility analysis
- Benchmarking
- Leading practice assessment
- Performance evaluation
- Project planning
- Leadership education and buy-in
- Staff evaluation
- Change readiness assessment
- Site visits

## DESIGN

- Current state analysis
- Future state design
- Business case development
- Service delivery model design
- Work scope delineation
- Intelligent automation strategy
- Sourcing evaluation
- Organizational design
- Technology evaluation
- Transformation planning
- Implementation planning
- Change management

## BUILD

- Project management
- Service and transaction center build
- Detailed organizational design
- Staffing
- Process redesign
- Technology design, selection, implementation, and support
- Education and training
- Facility design and setup
- Change management
- Sourcing implementation

## IMPROVE

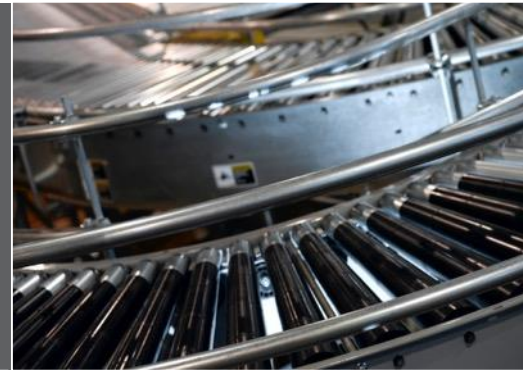
- Analytics setup and deployment
- Operations improvement
- Governance
- Service expansion
- Cost reduction
- Process redesign
- Intelligent automation opportunities/implementation
- Technology upgrade
- Merger and acquisition integration
- Field resource development
- Customer satisfaction measurement
- Metrics and performance management

# Areas of Focus



## HUMAN CAPITAL MANAGEMENT

We offer HR transformation (including HR shared services), analytics, HR systems (selection, implementation, and optimization), process design and continuous improvement, talent and employee engagement strategy and programs, and payroll—the services your organization needs to excel.



## SUPPLY CHAIN

We assist clients across the full range of supply chain processes, and have the unique ability to create alignment between supply chain and its stakeholders. From crafting new supply chain strategies to restructuring your organization to improving your daily operations, we help you with every step.



## TECHNOLOGY

From IT assessments and strategic direction to governance, cybersecurity, and risk and compliance management, we can help your organization get the most out of its IT investment. We also help you optimize your projects to focus on delivering business outcomes not just installed technology.



## BUSINESS ADMINISTRATIVE SERVICES

We help our clients integrate various administrative services into their shared services model to improve service response performance to the business. Services often include real estate, facility maintenance, fleet, security, insurance, customer service, cafeteria, and others.



## FINANCE AND ACCOUNTING

We help companies transform their finance and accounting operations. Through enterprise financial business services, strategic centers of expertise, intelligent automation solutions, hybrid insource/outsource delivery models, and other solutions, we help you increase value for your company.





## MULTIFUNCTION/GBS

We move shared services to the next generation—integrating finance, human resources, information technology, supply chain, and/or other business administrative services into a single, multifunction shared services or global business services operation with effective governance and management.

# How We Differ from Our Competition

	Strategy Firms	The Big Four	Outsourcing Advisory Firms	HR/Functional Consultancies	ScottMadden
FOCUS	<ul style="list-style-type: none"> <li>Strategy work</li> <li>Mergers and acquisitions</li> <li>Cost reduction</li> </ul>	<ul style="list-style-type: none"> <li>Strategy and implementation work</li> <li>Large system implementations</li> <li>Outsourcing and offshoring</li> <li>Long engagements</li> </ul>	<ul style="list-style-type: none"> <li>Advisory services regarding vendor-providing solutions</li> </ul>	<ul style="list-style-type: none"> <li>Functional program development and/or support (e.g., health and welfare, compensation)</li> <li>Delivery systems</li> <li>Unique products (e.g., surveys)</li> </ul>	<ul style="list-style-type: none"> <li>Strategy and implementation work</li> <li>Efficient delivery models</li> <li>Full SSO lifecycle support</li> <li>Engagements scoped in manageable phases</li> </ul>
APPROACH	<ul style="list-style-type: none"> <li>Solutions focused on big picture, but not always practical</li> <li>Not often involved in implementation</li> </ul>	<ul style="list-style-type: none"> <li>Off-the-shelf methodologies</li> <li>Client must adapt to consultant's approach</li> <li>Large project teams</li> <li>Get in and stay in; take over</li> </ul>	<ul style="list-style-type: none"> <li>Sourcing analysis and solutions</li> <li>Standard methodologies</li> <li>Limited client involvement after data capture</li> <li>Neutral or vested interest as a provider</li> </ul>	<ul style="list-style-type: none"> <li>Advisory role</li> <li>Research and program-based solutions</li> <li>Implementation of unique technologies</li> </ul>	<ul style="list-style-type: none"> <li>Customized, practical solutions</li> <li>Small project teams</li> <li>Collaborative approach with clients</li> <li>Sale not mixed with delivery of work</li> </ul>
PROJECT TEAMS AND PEOPLE	<ul style="list-style-type: none"> <li>Leverage reputation</li> <li>Teams comprised of mix of senior and junior resources</li> <li>Generalists</li> <li>Strong business acumen, weaker functional skills</li> </ul>	<ul style="list-style-type: none"> <li>Sales team is not involved in delivery</li> <li>Teams comprised of junior, inexperienced resources with oversight by senior resources</li> </ul>	<ul style="list-style-type: none"> <li>Sales team is not involved in delivery</li> <li>Teams comprised of junior resources with oversight by senior resource</li> </ul>	<ul style="list-style-type: none"> <li>Leverage reputation</li> <li>Deep functional knowledge, narrower focus</li> </ul>	<ul style="list-style-type: none"> <li>Working partners meet with prospective clients</li> <li>Senior, experienced consultants with business acumen and functional knowledge</li> </ul>

# Representative Clients

Consumer Products and Services	Manufacturing	Technology and Communications	Higher Ed., Public Sector, and Defense	Energy and Utilities	Healthcare and Pharmaceuticals	Professional Services
						
						
						
						
						
						
						

Note: Representative sample; not all-inclusive of clients served. Excludes numerous well-known clients due to confidentiality agreements

# Why ScottMadden?

**Our expertise helps create  
the right solution.  
Our experience ensures  
that it works.**



## DEEP EXPERTISE

- ScottMadden has been a pioneer in corporate and shared services since the practice began decades ago
- Our Corporate & Shared Services practice has completed more than 1,600 projects since the early 90s
- Our clients span a variety of industries from energy to healthcare to higher education to retail

## PERSONALIZED APPROACH

- Before we begin any project, we sit down and listen to our clients' needs and challenges
- We engage with our clients like no other firm does, working side by side to create practical, real results
- We don't employ canned methodologies or cookie-cutter solutions. We work to solve the right problem in the right way

## PHILOSOPHY

- We are personally invested in every project and measure our success by our clients' success
- We listen to our clients' needs and put their best interests ahead of our own
- We work with integrity, tenacity, and a genuine passion for what we do
- We do what it takes to get it done right

# ScottMadden's Proprietary Toolbox

ScottMadden has a dedicated research function that studies and maintains critical data on trends, metrics, and regulations that impact corporate and shared services organizations. Our toolbox includes many resources we will leverage when working with you:

## ASSESSMENT TOOLS

- Customer satisfaction survey
- Work activity assessment
- Competency assessment
- Spans and layers analysis

## RESEARCH

- Primary functional research
- Proprietary shared services benchmarking studies
- Leading practice database
- Country regulation database

## PROJECT ACCELERATORS

- Project management toolkit
- Templates and collateral materials
- Change management toolkit
- Global site selection database

**We employ a variety of tools built over years of experience to support our work and develop the best solution to meet your needs.**



# Aligning HR Strategy and Delivery for Improved Efficiency

### CHALLENGE

A large defense contractor needed to standardize HR and become more cost effective and agile to allow them to compete successfully in the growing industry. Current business groups were resistant to change and frequently reorganized.

### PROCESS

- Evaluated client's current HR processes, identifying areas for improvement
- Developed and planned a shared services model to increase effectiveness, efficiency, and standardization
- Leveraged deep experience working with defense contractors and ScottMadden's customized approach to implementation
- Identified initiatives to improve the overall efficiency and effectiveness of the client's HR processes that aligned with the new model

### RESULTS

- As a result of moving to the proposed shared services model, the client achieved a 20% reduction in HR staff, and more than 100 business-specific policies were harmonized and consolidated into 32 enterprise-wide policies
- Improvements created standardization and cost effectiveness, allowing the client to better compete in the industry



## Case Study

# Conducting Work Activity Analysis to Facilitate Decision Making

### CHALLENGE

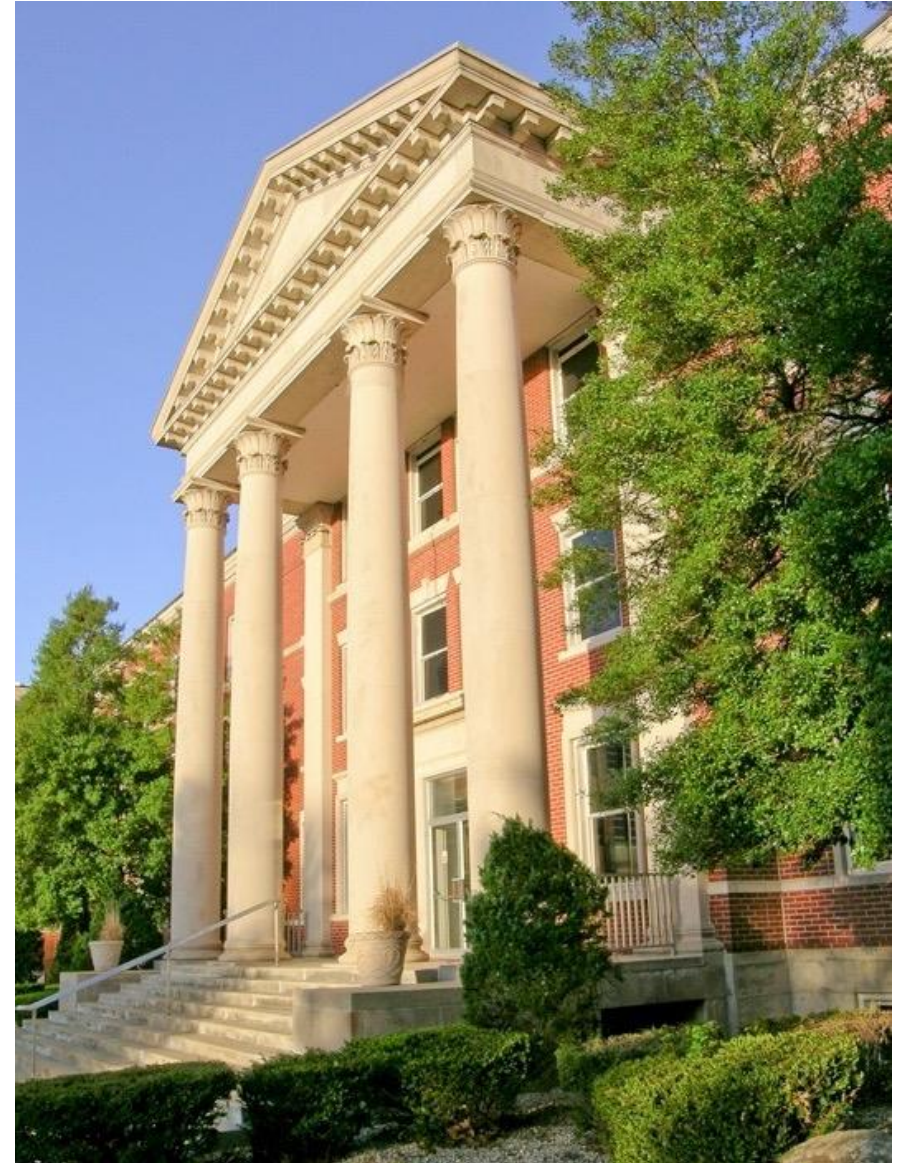
A large state university sought to improve institutional effectiveness and strengthen its culture of service by ensuring that academic support activities and business practices were efficient, responsive, and cost effective.

### PROCESS

- Employed ScottMadden's proprietary survey tool to conduct an FTE inventory of more than 2,000 staff members to determine who performs the functional area activities and the level of effort (FTEs) employed to complete that work
- Provided analysis of opportunities based on leading practices and benchmarks
- Assisted in designing, configuring, deploying, and tabulating a survey to capture the percentage of time individuals dedicated to activities associated with target functions

### RESULTS

- 95.8% survey response rate
- Project generated significant cost reductions and improved efficiency
- Utilizing project results, the university continued its more detailed planning for the number, scope, and location of its regional business operations centers



# Transformation of Service Delivery – On a Dime

### CHALLENGE

A medical product and service company was focused on growth on a global scale and wanted to standardize service, improve administration of global processes, centralize administrative tasks, and elevate the HR business partner role. A dispersed employee base, competing objectives of each business, and cut-backs in funding presented challenges to implementing the goals.

### PROCESS

- Created and managed the overall project plan and led the client project team through key decisions and milestones in the transformation
- Worked step by step with the client to ensure the project's success

### RESULTS

- Client launched a new HR shared services center for all employees in July 2012
- Client released a new HR portal to allow employees access to readily available information and to initiate service requests
- Team successfully defined the role of the HR business partner in the HR transformation



# Our Team

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**Brad DeMent**  
Partner

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Brad DeMent is the leader of the Finance & Accounting shared services practice at ScottMadden. He also specializes in Global Business Services (GBS) design and build with extensive experience in the Latin America region as well as Europe and Asia-Pacific. With more than 25 years of domestic and international consulting experience, Brad brings extensive experience designing, improving, and merging shared services and GBS operations. Although his focus is on shared services strategy and implementation, Brad also has experience in building multifunction shared services operations in Mexico, Central America, and South America.



**Trey Robinson**  
Partner

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Trey Robinson is a business strategist and shared services leader, specializing in financial advisory and multi-function shared services design, implementation, and improvement. With 18 years of consulting experience, Trey brings extensive knowledge in creating and implementing shared services strategies, leading major corporate initiatives, and improving profitability for client companies. He has interacted with corporate directors and officers of domestic and global companies covering a broad range of telecommunications, energy, aerospace and defense, retail, business services, software, and manufacturing industries.

# Locations

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**Smart.  
Focused.  
Done Right.®**

## **ATLANTA**

3495 Piedmont Road, NE  
Building Ten, Suite 805  
Atlanta, GA 30305-8800  
404.814.0020

## **RALEIGH**

2626 Glenwood Ave  
Suite 480  
Raleigh, NC 27608-1367  
919.781.4191

## **WESTBOROUGH**

1900 West Park Drive  
Suite 250  
Westborough, MA 01581  
508.202.7918

