

Smart. Focused. Done Right.®

Overview of ScottMadden's Shared Services in Higher Education Solutions

Shared Services in Higher Education

November 2018



Who We Are

ScottMadden is a management consulting firm with more than 35 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.

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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 1,700 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, implementation, and improvement.

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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

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



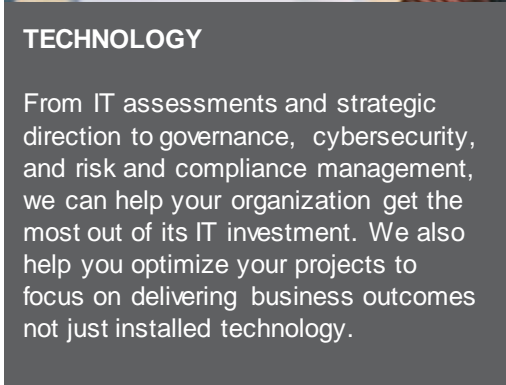
HUMAN CAPITAL

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

Sample of Clients in Higher Education



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 1,700 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 Knows Higher Education

Colleges and universities have complex organizations, diverse objectives and stakeholder groups, and proud, long-standing cultures. ScottMadden understands these unique aspects.

CUSTOMER GROUPS

- Faculty, staff, and students all have needs that must be met through your model

COMPLEX GOVERNANCE

- Decision making takes time and often must include various stakeholders, including central administration and deans

UNIQUE SERVICES

- Services such as Contracts and Grants, Research, Student Services, and Development are often good candidates for inclusion in shared services

BUDGET CONSTRAINTS

- Public institutions face unprecedented budget cuts
- Private school funding must balance other university priorities



We use a disciplined assessment and implementation approach proven in higher education settings.

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.

Case Study

Conducting Work Activity Analysis to Facilitate Decision Making

CHALLENGE

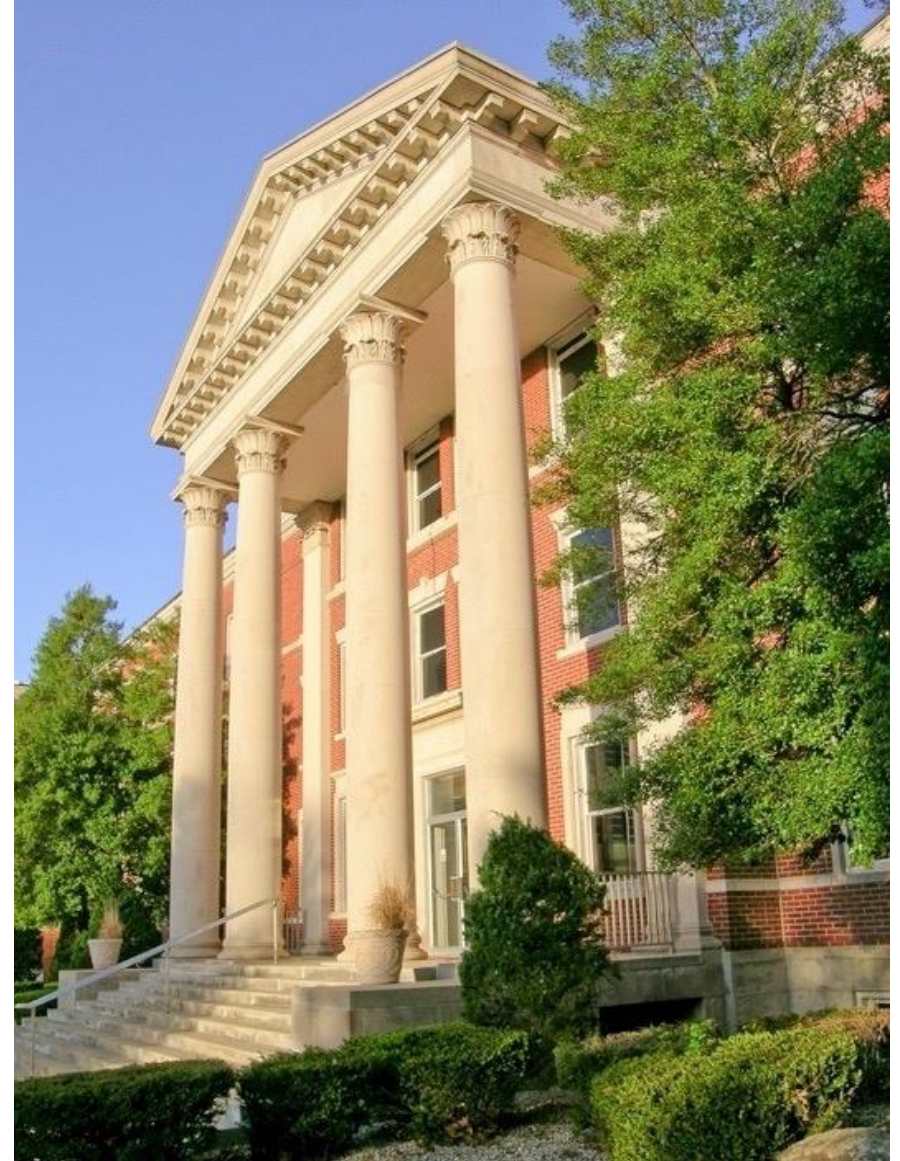
A large state university sought to improve institutional effectiveness and strengthen its culture of service by ensuring that academic support activities and business practices were efficient, responsive, and cost effective.

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



Case Study

Assessing HR Alignment for Improved Strategic Focus

CHALLENGE

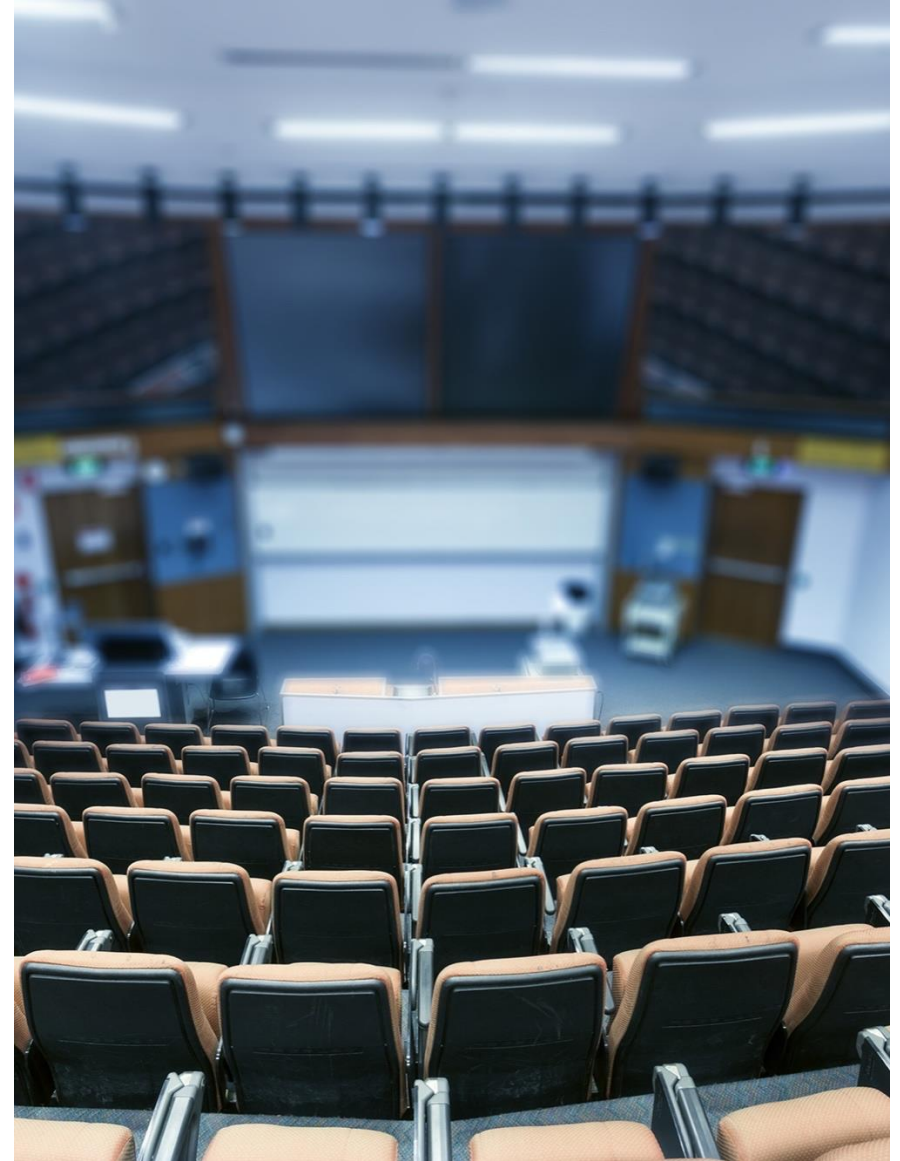
A small public, comprehensive university, with a total enrollment of approximately 5,000 students, expected their enrollment to double within five years. The university's HR organization had grown with the university, but budget constraints, lack of supporting technology, and outgrown processes had resulted in diminished customer satisfaction. Leadership asked ScottMadden to assess the HR functions across campus and make recommendations for improvement.

PROCESS

- Completed a systematic review of the HR department. This comprehensive assessment focused on HR budgets, services, customers, volumes, request cycles, service delivery model, processes, organization and staffing, and supporting technologies
- Conducted a work activity analysis of HR and payroll employees as well as administrative staff in other units that touched HR processes. This analysis provided recommendations to move HR to a more strategically focused organization
- Collaborated with staff to develop the most impactful opportunities and options for implementation. The developed recommendations enabled HR to provide higher-level support for their growing institution

RESULTS

- Client identified needs for strategic talent management, a streamlined organization, specific service process opportunities, a customized shared services delivery model, and service management technologies
- Client is in the process of evaluating recommendations and plans with the intent to walk through an incremental implementation that can be accomplished within budgetary and HR constraints



Case Study

Facilities and Services Organization Strategy Session

CHALLENGE

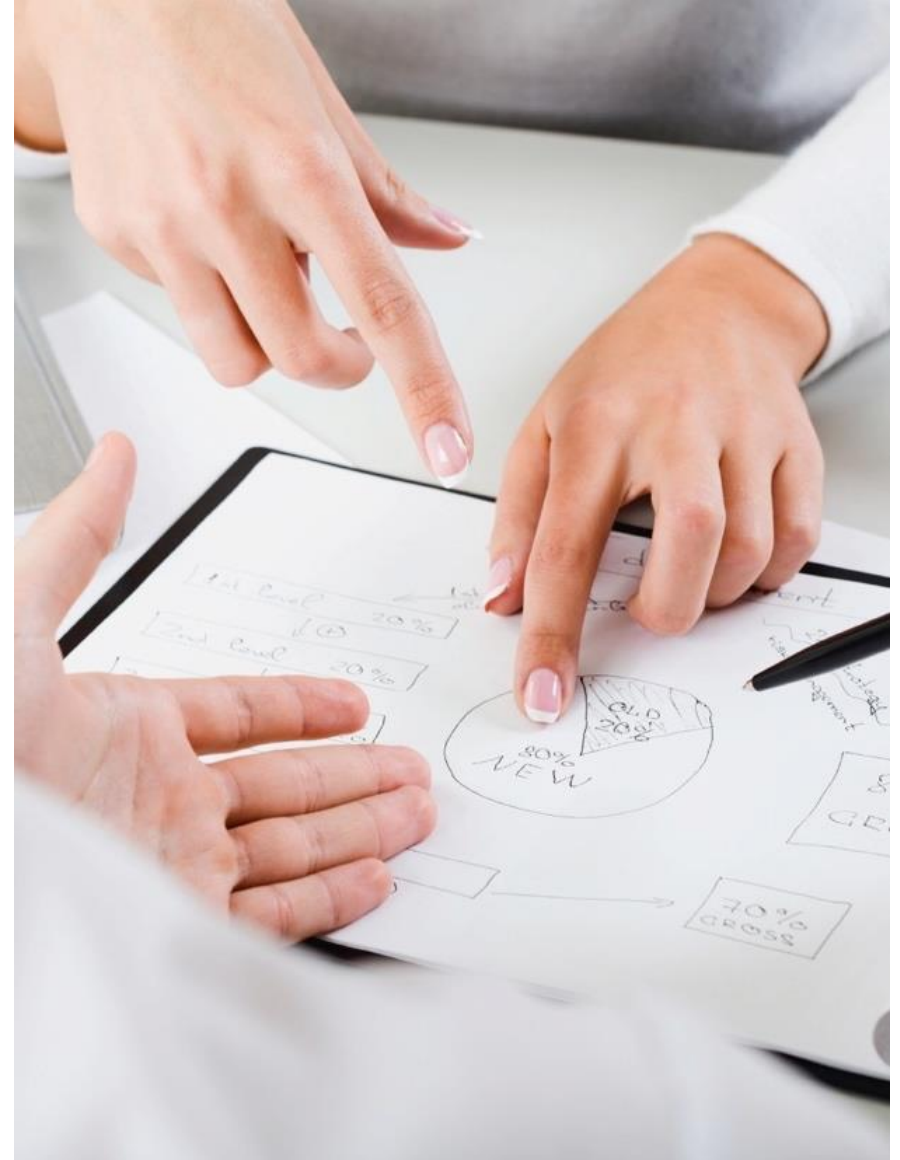
ScottMadden worked with the facilities and services organization at a large state university to create a shared services vision and plan that supported the university's strategic plan.

PROCESS

- Helped the management team clearly define its shared services vision and plans
- Created strategic initiatives to transform the facilities and services group to a top-tier performer
- Designated a dedicated resource within the organization to provide ongoing support

RESULTS

- The facilities and services organization is correctly perceived throughout the university as having a vision and a plan that will enable it to support the university's strategic plan
- The organization is aligned and motivated to substantially improve its performance and meet the increasing demands of the university
- The organization is equipped and resourced to meet future challenges



Case Study

HR Transformation Assessment and Design

CHALLENGE

ScottMadden was engaged to design the future state of service delivery for HR at a private educational institution.

PROCESS

- Conducted interviews across HR and with key stakeholders to document the current state for recruiting and staffing, benefits administration, learning and development, personnel actions and payroll transactions, and employee relations
- Explored future state process design during workshops with subject matter experts
- Conducted key customer feedback sessions to test future state processes
- Designed future state processes and developed corresponding procedural details for the service center
- Recommended organizational changes and technological improvements to support the future state

RESULTS

- Creation of a future state design for tiered service delivery based on leading practices and contributions from key customers and HR professionals
- Documentation of current state processes to serve as a baseline for change
- Alignment of the HR organization with a common vision for the future of HR service delivery
- Development of an actionable plan for a full implementation of a leading practice HR service center, including recommendations for organizational change and options for technological improvements



Our Team



Scott Manning
Partner and Practice Area Leader

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Scott Manning heads ScottMadden's Corporate and Shared Services practice. Scott has more than 27 years of consulting experience in aerospace and defense, education, energy, entertainment, healthcare, telecommunications, manufacturing, technology, retail, and transportation in the United States and abroad, including Asia, Australia, Canada, Europe, South America, and the United Kingdom. His areas of expertise include human resources, shared services design and implementation, employee service center design and implementation, outsourcing, operations improvement, organization design and staffing, and change implementation and management.



Courtney Jackson
Partner

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Courtney Jackson has 17 years of consulting experience, focusing the last 10 years in corporate and shared services. Areas of expertise include human resources management, shared services strategy, design and implementation, project and change management, operations improvement and process redesign, shared services delivery/operations, organization design and restructuring, and governance. Courtney's experience spans manufacturing, higher education, aerospace and defense, entertainment, retail, energy, and real estate, primarily within the human resources and finance and accounting disciplines.

Locations

**Smart.
Focused.
Done Right.®**

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