

# ScottMadden's Corporate & Shared Services Practice and RPA Solutions

December 2018

Smart. Focused. Done Right.®



# Who We Are

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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

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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



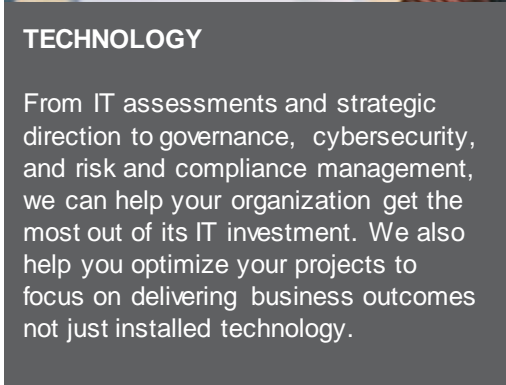
## HUMAN CAPITAL

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.

# Spotlight: Digital Transformation

Digital transformation is changing the way our clients do business. Since our inception in 1983, ScottMadden has been advising our clients on ways to leverage technology to deliver efficient processes and services to internal customers.

We provide digital transformation services across geographies and industries, including aerospace, consumer products, defense, higher education, energy, entertainment, financial services, healthcare, manufacturing, pharmaceuticals, retail, technology, telecommunications, transportation, and others.

Whether we are designing a proof of concept or implementing a broader digital strategy, we ensure our clients achieve the business value desired.

ScottMadden has experience supporting clients across a variety of digital automation technologies including:

- Robotics process automation (RPA)
- Desktop automation
- Attended and unattended robots
- Cognitive robots

In addition, we have dedicated expertise to support digital transformation across functional areas comprising:

- Finance and accounting
- Human capital management
- Supply chain
- Information technology
- Business administration

### DIGITAL TRANSFORMATION SERVICES

#### Digitization Strategy

- Guiding principles
- Delivery model design
- Alignment of automation capability to need
- Business case
- Implementation strategy

#### Proof of Concept Design

- Process identification
- Process design and mapping
- Process scripting and testing
- Production readiness

#### Digital Implementation

- Digitization advisory services
- Vendor landscape and selection facilitation
- Testing design, cutover, and facilitation
- Training support
- Project management

#### Operations and Governance

- Governance model evaluation
- Center of Expertise design and creation
- Roles and responsibilities
- Metrics and analytics

#### Digital Expansion

- Process identification
- Automation criteria
- Prioritization matrix
- Expansion timeline

# How We Differ from Our Competition














FOCUS

APPROACH

PROJECT TEAMS AND PEOPLE

	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

Retail and Consumer Products	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 1,700 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'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.**



# RPA Vendor Evaluation

### CHALLENGE

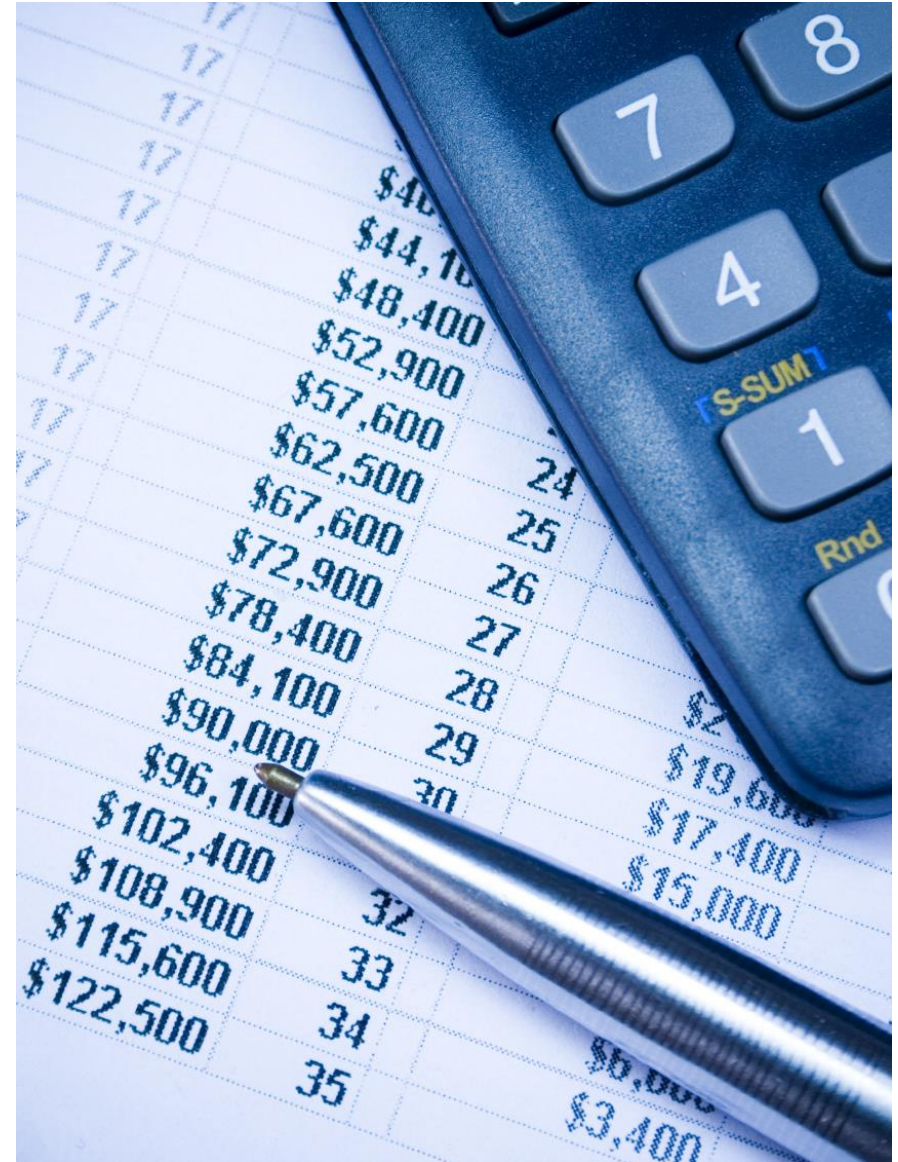
A large financial institution needed to conduct market research on the RPA industry and the major players. There was a concern that the evolving technology may not have the right level of maturity to fit with the stringency of the company's procurement process and strategy.

### PROCESS

- Conducted research on RPA services and vendor capabilities
- Identified customized list of vendors worth pursuing
- Confirmed RPA vendors are well-established and capable of long-term implementation
- Established a customized view of the vendor landscape for RPA solution providers
- Consolidated, presented, and explained findings and recommendations

### RESULTS

- The final tiered list of RPA vendors enabled the company to focus its procurement strategy on the right potential partners while exceeding the requirements inherent in the procurement process



# RPA Pilot and COE Design

### CHALLENGE

A leading provider of online legal research utilized large groups of labor based in low cost global locations to conduct repetitive process work. RPA presented an opportunity to reduce large amounts of manual work and gain a competitive edge. However, differing opinions of RPA roles for business operations, IT, and a new COE posed numerous governance challenges. ScottMadden was retained to conduct a pilot and help design a sustainable governance model for an enterprise-wide RPA program.

### PROCESS

- Met with stakeholders to identify problem processes
- Measured process volume and time to estimate a RPA's ROI
- Down-selected high-volume, high-impact processes
- Mapped and recorded processes in detail
- Scripted five processes in UiPath
- Tested with historical data and completed user sign-off
- Conducted training to build client internal capability
- Designed a hybrid governance model and defined COE roles
- Validated governance recommendations in workshop setting
- Assisted with robot move to production

### RESULTS

- Documented immediate ROI and 10X improvement in process speed
- Trained staff to locate, map, script, and test their own processes
- Established an initial RPA COE and gained agreement on roles



# RPA Proof of Concept Design

### CHALLENGE

A global non-profit financial organization needed to improve the operational efficiency of its shared services operations in order to lower the overall cost of process ownership and deliver its services more effectively. A multi-faceted RFP needed to be created to obtain the right RPA solution provider.

### PROCESS

- Reviewed a preliminary set of process candidates for use cases
- Determined the criteria for “down-selecting” process candidates to five use cases
- Finalized the scope of the RFP and drafted use cases for the five selected processes
- Established process requirements and vendor evaluation criteria
- Determined technology requirements (e.g., access rights, source systems, etc.) necessary to support the proof of concept for the various use cases as well as the pilot and future implementation
- Defined timing associated with the RFP
- Finalized the RFP in preparation for its release to RPA solution providers

### RESULTS

- Targeted RFP vetted by stakeholders to pursue an RPA solution and build an RPA program
- Functional and technical requirements and evaluation criteria for the overall process including the proof of concept



# Our Team



**Scott Manning**  
Partner and Corporate & Shared Services  
Practice Leader

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**O** 404.814-0020  
**C** 404.456.1176

Scott Manning has more than 23 years of consulting experience in shared service design and implementation, employee service center design and implementation, outsourcing, operations improvement, organization design and staffing, human resource management, strategic and business planning, and change implementation and management.



**Brad DeMent**  
Partner and Finance & Accounting  
Practice Lead

**E** bdement@scottmadden.com  
**O** 404.814-0020  
**C** 678.524.2496

Brad DeMent specializes in Global Business Services (GBS) design and build. Brad has more than 25 years of domestic and international consulting experience in designing, improving, and merging shared services and GBS operations. Brad also has experience in building multifunction shared services operations in Mexico, Central America, and South America.



**Trey Robinson**  
Partner

**E** treyrobinson@scottmadden.com  
**O** 919.781.4191  
**C** 919.522.1740

Trey Robinson specializes 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.

# Locations

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**Smart.  
Focused.  
Done Right.®**

## **ATLANTA**

3565 Piedmont Road, NE  
Building Four, Suite 500  
Atlanta, GA 30305-8800  
404.814.0020

## **RALEIGH**

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

## **WESTBOROUGH**

1900 West Park Drive  
Suite 250  
Westborough, MA 01581  
508.202.7918



**Appendix**



# We Consult in Two Main Areas



## Energy

Our industry-leading clients trust us with their most important challenges. They know that chances are that we have seen and solved a similar problem.

ScottMadden has worked in every business unit and every department across companies in the energy utility ecosystem.



## Corporate & Shared Services

Our Corporate & Shared Services practice helps clients assess and improve corporate functions, including communications, environmental, finance and accounting, fleet, governmental and regulatory affairs, health and safety, human resources, information technology, legal, security, supply chain, and others. We provide guidance in a variety of industries from energy to healthcare to higher education to retail.

# Spotlight: Our Information Technology Practice

ScottMadden helps organizations create measurable IT value, using strategies for engaging business leaders in decision making to optimize enterprise IT investment performance.

Many businesses face a similar IT leadership scenario—the business struggles to understand the value received from their IT investments, and the IT organization struggles to engage business leaders in the IT decision making necessary to deliver strategic outcomes.

IT is inundated in leading practices and industry frameworks. But organizations struggle to determine where to start, what is good enough, and how to involve both IT and non-IT stakeholders to deliver business results. ScottMadden's IT value-creation management approach is different. It focuses on the pain points specific to your organization and provides clear, practical guidance rather than concepts.

The impact of IT on today's businesses is greater than ever before. Companies are facing higher IT costs, managing complex technology and processes, and supporting an increasing number of compliance and regulatory requirements. Organizations with effective IT investment decision-making processes share certain characteristics, including involved business leaders, use of well-defined, repeatable processes, and a common IT direction with actionable objectives.

ScottMadden helps IT organizations transform from order takers and fire fighters to technology leaders. We provide the tools necessary for CIOs to engage their executive peers in providing the technology direction necessary to optimize IT investments and create measurable enterprise value.

## INFORMATION TECHNOLOGY SERVICES

### IT Assessments

- IT governance and management capabilities evaluation: maturity of IT practices, technical condition and business value of business application portfolios, and efficiency of the IT operations
- IT cost evaluation, including an assessment of the drivers of cost both within the IT operation and external to it (i.e., business-driven cost drivers)
- Development of findings and actionable recommendations tailored to your environment, industry, and corporate strategies

### IT Strategic Direction

- Enterprise business technology vision development, including supporting business engagement services
- IT road map development (the plan to deliver your vision)

### IT Governance

- Design and implementation of tiered governance structures to evaluate, direct, and monitor IT investments and performance throughout the enterprise
- Design and implementation of PMOs to monitor IT project portfolio performance and provide necessary governance line of sight and controls

### IT Risk and Compliance Management

- IT risk and compliance assessments against industry standards and frameworks (e.g., NIST, ISO, ISACA, etc.)
- IT security program development, including policy and process and procedure development and implementation
- IT risk and compliance process improvement and alignment with industry standards

# Spotlight: Our Finance and Accounting Practice

Finance and accounting is a core specialty at ScottMadden and has been since our inception in 1983. As such, we have a dedicated finance and accounting practice that consults across geographies and industries, including aerospace, consumer products, defense, higher education, energy, entertainment, healthcare, manufacturing, pharmaceuticals, retail, technology, telecommunications, transportation, and others.

Whether we are designing and implementing new service delivery models, expanding existing operations, or evaluating outsourcing opportunities, we ensure our clients achieve the business value desired.

ScottMadden has extensive experience supporting clients across finance and accounting functions, including:

- Accounts payable, including travel and expense
- Billing, credit, collections, and cash application
- Payroll and time collection
- General accounting and fixed assets
- Tax and treasury
- Financial planning and analysis
- Budgeting and forecasting

In addition, we have dedicated expertise across end-to-end, cross-functional processes comprising:

- Procure-to-pay
- Record-to-report
- Order-to-cash

## FINANCE & ACCOUNTING SERVICES

### Finance Transformation

- Finance transformation strategy
- Multifunction strategy and expansion planning
- Benchmarking and leading practices evaluation
- Service delivery model design or redesign
- Business case development
- Implementation planning/support/project management
- Analytics, metrics, and performance management

### Digitization Strategy and Implementation

- RPA and Artificial Intelligence (AI) strategy and application
- RPA and AI opportunity identification and business case
- Vendor selection and implementation management
- Governance and vendor management

### Financial and Service Management Systems

- Finance technology advisory services
- Systems requirements identification
- Vendor selection facilitation
- Configuration design
- Testing design and facilitation

### Process Design and Continuous Improvement

- End-to-end process design
- Global process owner creation
- Continuous improvement program design
- Customer satisfaction program development

### Other Strategic Initiatives

- Merger and acquisition integration
- Divestiture and transition services
- Cost reduction and operations improvement
- Service expansion

# Spotlight: Our Payroll Practice

ScottMadden helps organizations transform their payroll operations to the accurate, compliant, stable, low-cost, and customer-focused service desired. Our work in payroll ranges from standalone improvement initiatives to inclusion as part of a broader human resources or finance and accounting transformation.

Whether we are improving the end-to-end process from time entry through escheatment, addressing compliance, improving customer service, implementing new technology, or evaluating outsourcing opportunities, we ensure our clients achieve the results and business value desired.

Our teams assist clients with domestic U.S. and global payroll challenges with assessment, design, and implementation of solutions that include both in-house and outsourced components. In either case, payroll requires an end-to-end view and consideration of the overall functional delivery model objectives.

## PAYROLL SERVICES

- Payroll delivery strategy
- Delivery model design
- Opportunity evaluation and business case
- Performance benchmarking
- Leading practice and compliance assessment
- Work activity and customer satisfaction surveys
- Policy modification and harmonization
- Process improvement and end-to-end design
- Organization design and staffing
- Technology optimization
- Technology and vendor selection
- Technology implementation
- System requirements identification
- Implementation planning and execution support
- Governance and vendor management
- Dashboards and reporting

We have assisted a wide range of clients in the assessment, design, build, implementation, and/or improvement of their payroll services functions:

- Advocate Healthcare
- Aramark
- ATT
- BAE Systems Inc.
- BHP Billiton
- Cedar-Sinai
- Domtar
- Dura Automotive
- Enpro
- Entrada
- Exelon Corporation
- HCA
- Kforce
- NASA
- Northrop Grumman
- Oakley
- Pfizer
- Sealy
- Sempra Energy
- Simmons Bedding
- Tarkett
- Time Warner
- Turner
- The University of Akron
- Warner Bros.
- West Virginia University



# Spotlight: Our Human Capital Practice

HR is a core specialty at ScottMadden and has been since our inception in 1983. As such, we have a dedicated human capital practice that consults across geographies and industries, including aerospace, consumer products, defense, higher education, energy, entertainment, healthcare, manufacturing, pharmaceuticals, retail, technology, telecommunications, transportation, and others.

Whether we are improving talent management programs, revamping processes to ensure effectiveness and regulatory compliance, designing and implementing new service delivery models, expanding existing operations, or evaluating outsourcing opportunities, we ensure our clients achieve the business value desired.

ScottMadden has extensive experience supporting clients across the employee lifecycle, including:

- Workforce planning
- Talent acquisition
- Onboarding
- Workforce administration
- Compensation
- Payroll
- Performance management
- Learning and development
- Succession planning
- Employee engagement
- Workforce analytics

## HUMAN CAPITAL SERVICES

### HR Transformation

- HR transformation strategy
- Service delivery model design
- Business case development
- Implementation planning/support/project management
- Analytics organization launch
- Analytics model development and dashboard creation

### Systems

- HR technology advisory services
- Systems requirements identification
- Vendor selection facilitation
- Configuration design
- Testing design and facilitation

### Process Design and Continuous Improvement

- Process redesign
- LEAN implementation
- Continuous improvement program design

### Talent and Engagement

- Talent management strategy
- Program development
- Organization design and build
- Competency development
- Implementation planning

### Payroll

- Payroll delivery strategy and design
- Implementation planning/support/project management
- Governance and vendor management

# Spotlight: Our Supply Chain Practice

We've been helping supply chain organizations move beyond their conventional "order taker" role for nearly two decades. Through our deep expertise and practical know-how, we assist clients across the full range of supply chain processes and have the unique ability to create alignment between the supply chain function and its internal customers and stakeholders.

ScottMadden has experience across all functions in the supply chain, including:

- Planning and forecasting
- Sourcing
- Procurement
- Logistics
- Materials management
- Accounts payable

ScottMadden has developed a "supply chain maturity model" to differentiate the phases that companies pass through on their journey to "world class." The model is divided into three "stages," representing a higher degree of performance effectiveness and efficiency as companies advance in their maturity. This model serves as a foundational element of our support services to assist companies in optimizing their supply chains.

Our solutions provide lasting improvements and allow our clients' supply chain organizations to better serve their internal customers.

## SUPPLY CHAIN SERVICES

### Supply Chain and Procure-to-Pay (P2P) Transformation

- Supply chain and P2P transformation strategy
- Organization design and staffing
- End-to-end process improvement
- Demand planning improvement
- Leading practice assessments
- Service delivery model and governance process design
- Business case development
- Implementation and change management planning and execution
- Outsourcing evaluations, vendor selection, and transition support

### Sourcing and Procurement

- Spend analysis and spend category market research
- Strategic sourcing execution
- Category management program design
- Risk management
- Supplier relationship management

### Logistics and Materials Management

- Inventory planning and optimization
- Warehouse location selection and design
- Warehouse facility management improvement
- Storage space optimization
- Lean warehousing
- Automatic identification and data capture opportunity evaluation and implementation
- Transportation management and network design