



Smart. Focused. Done Right.®

# Getting from Good to Great— Have You Realized Your Shared Services Goals?

A Framework for Assessing and Improving Your SSO Effectiveness

October 21, 2019



# Agenda

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**01**  
INTRODUCTIONS



**02**  
ABOUT  
SCOTTMADDEN



**03**  
TAKING YOUR SSO TO THE NEXT LEVEL



**04**  
ASSESSMENT AREA  
FRAMEWORK



**05**  
WHAT TO DO NEXT





# Introductions



# YOUR DISCUSSION LEADERS



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# About ScottMadden



About ScottMadden

## 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 **1,900** 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.

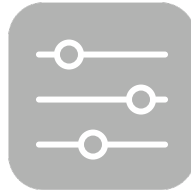
**Our corporate and shared services knowledge, expertise, and experience are unmatched—no other firm has helped more clients with more unique solutions.**

About ScottMadden

# 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.



# Taking Your SSO to the Next Level



Taking Your SSO to the Next Level

## Before We Begin...

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Today's session will be interactive. We encourage you to participate to share information and to see how your organization can go from good to great!



Taking Your SSO to the Next Level

## Opportunities Exist, Regardless of Your Maturity

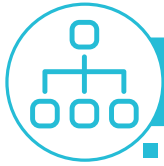


- Policy harmonization
- Process redesign
- Service delivery model review
- Organizational structure
- Technology implementation
- Governance model

- Process redesign
- Expansion opportunities
- Leverage of leading practices and benchmarks
- Training and staff retention
- Other technology investments
- Multifunction integration
- Governance clarification

- Continuous improvement
- Expansion opportunities
- Customer satisfaction
- Leverage of leading practices and benchmarks
- Career pathing
- Technology optimization
- Multifunction optimization

## You Have Shared Services...What Can Go Wrong?



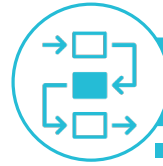
### People and Organization

- Limited or casual governance
- Weak change management
- High turnover
- Transactional focus
- Fragmented operations in multiple locations



### Technology

- Minimal integration between tools
- Multiple ERPs and supporting applications
- Limited use of available functionality
- Low adoption of tools



### Policy and Process

- Non-standard processes
- Lack of adherence to redesigned processes
- Manual workarounds
- Functional silos
- Limited focus on process improvement



### Data and Knowledge

- Ineffective performance metrics and reporting
- Internally focused; no understanding of customer's experiences or needs
- Low-customer satisfaction; high turnover

Taking Your SSO to the Next Level

# Where Are You Now?



## Where Are You in the Journey?

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Based on what you know today, where would you place yourself on the maturity curve?

- A. Start-up
- B. Growth
- C. Mature

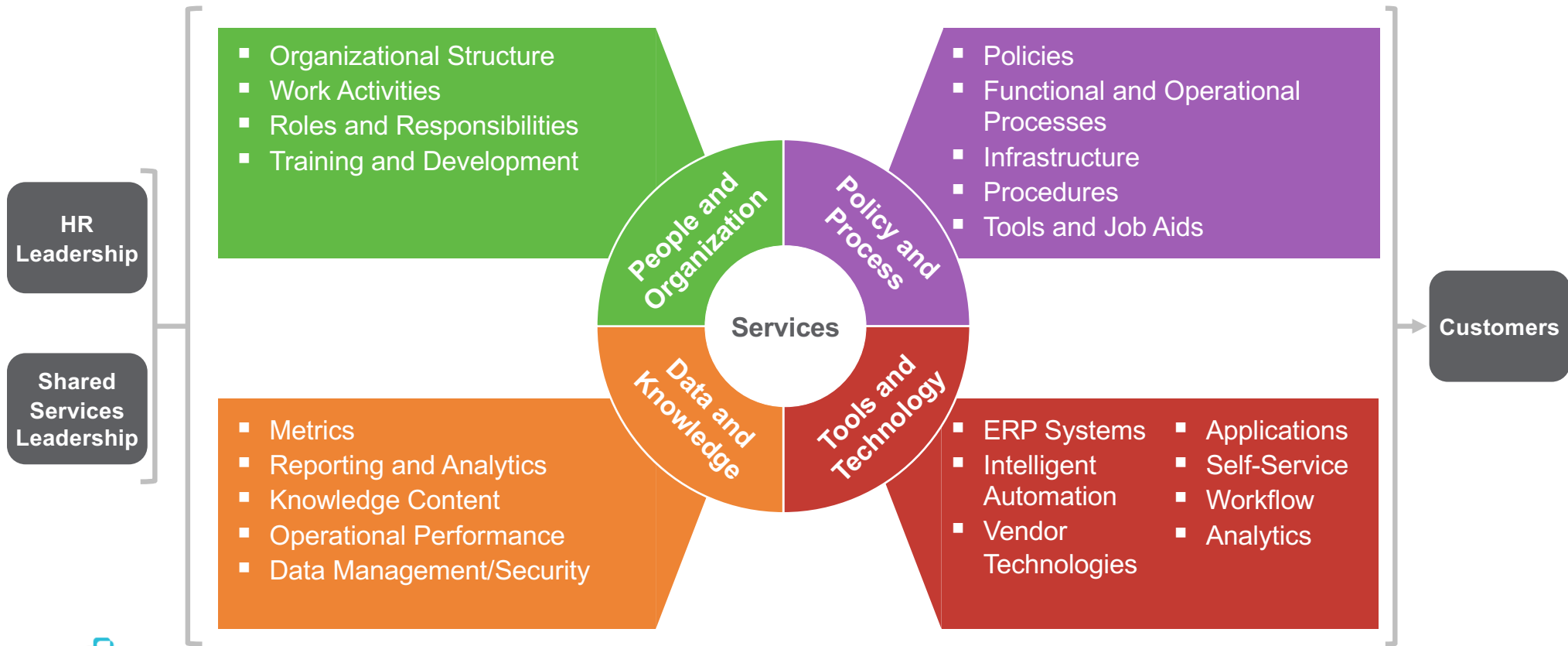




# Assessment Area Framework



# Shared Services Effectiveness Framework



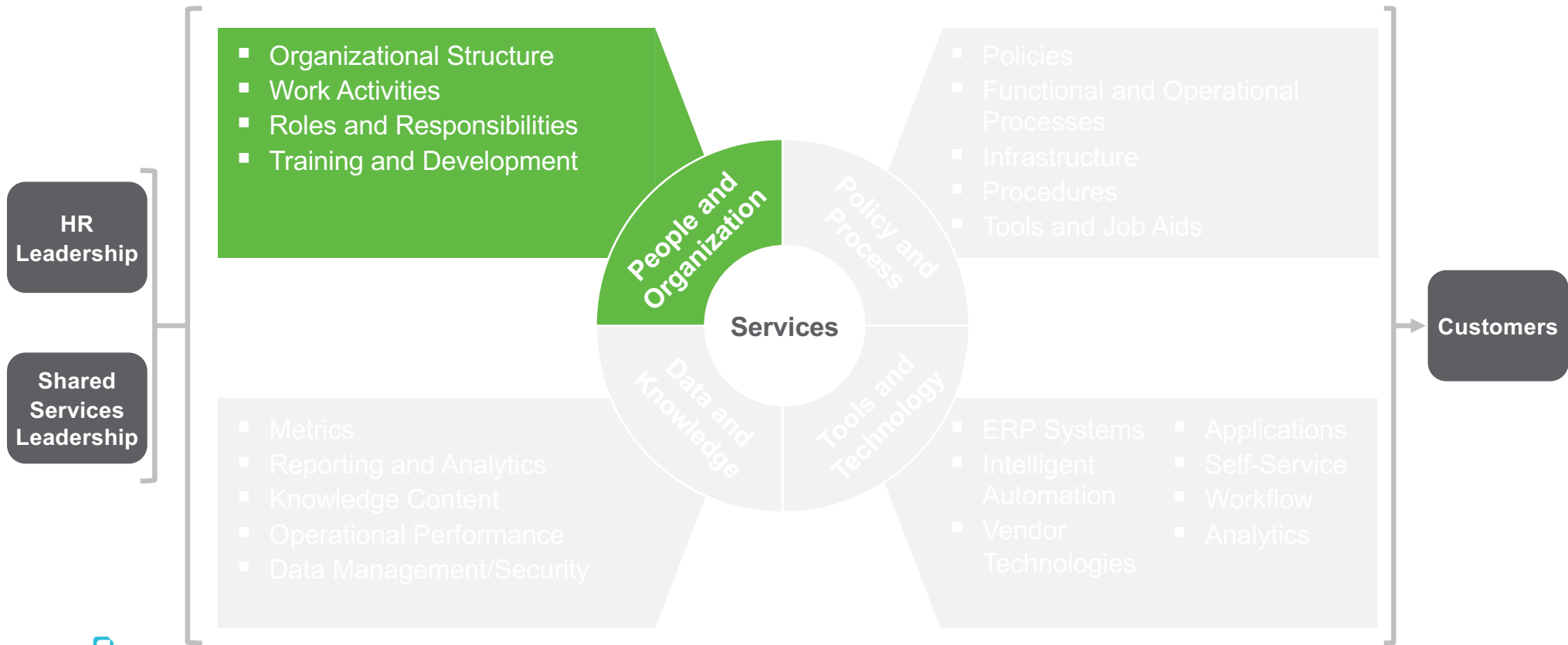


# People and Organization

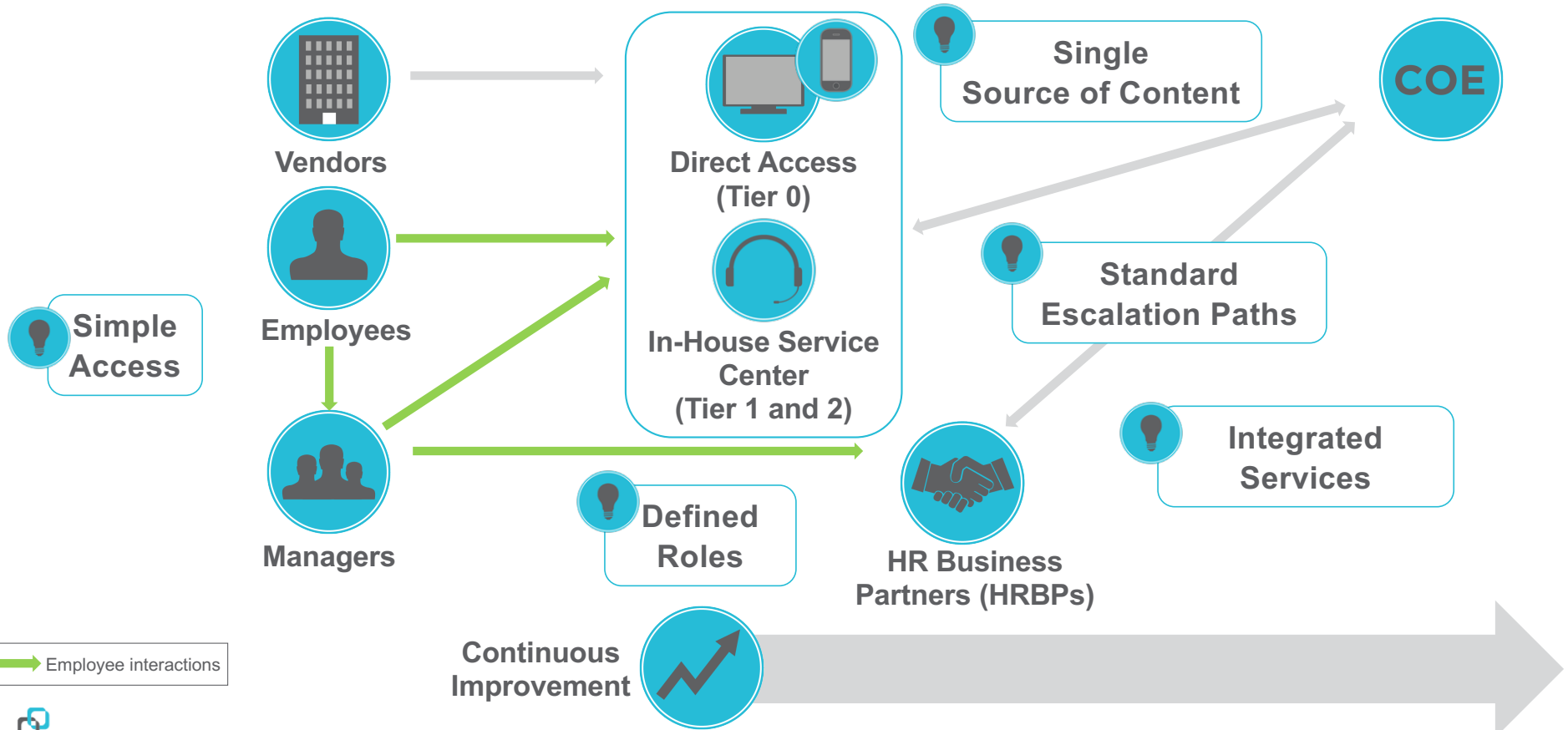
ASSESSMENT AREA FRAMEWORK



## Areas of Focus for Quadrant



# What Good Looks Like – Leading Practices Model



## What Good Looks Like – Staffing Ratios



Top-performing HR shared service organizations (SSOs) have significantly better staffing ratios, including their employee service centers.

**HR Staffing Comparisons**  
Top-Performer Group vs. Comparison Group

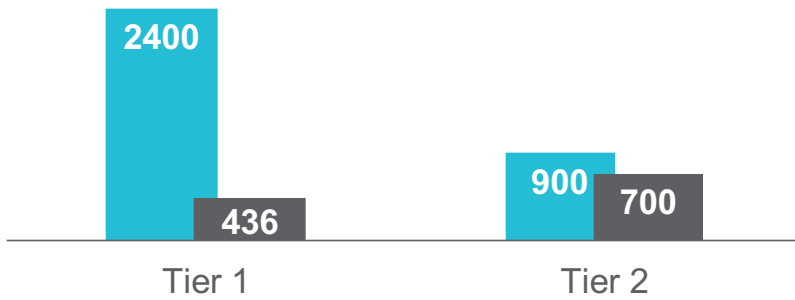


## What Good Looks Like – Tiered Model

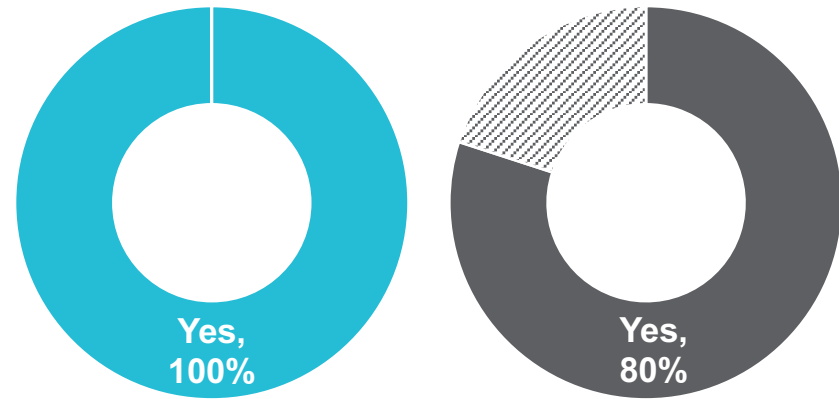


Top performers share a number of characteristics related to their people and organizational structure.

Total Company Employees per Headcount by Tier



Use of Tiered Model



■ Top-Performer Group ■ Comparison Group

## How Do You Compare?

What is your ratio of employees served per service center employee (total employees/service center employees)?

- We don't have a service center
- 200–400
- 401–700
- 701–1,000
- > 1,000

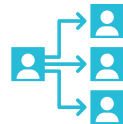


*Recall that mature organizations tend to more closely align with leading practice benchmarks.*

# Key Levers for People and Organization Effectiveness



**Governance**



**Role and Work Alignment and Clarity**



**Tiered Delivery Model**



**Competency Alignment**



**Employee Engagement**



**Career Paths and Development**

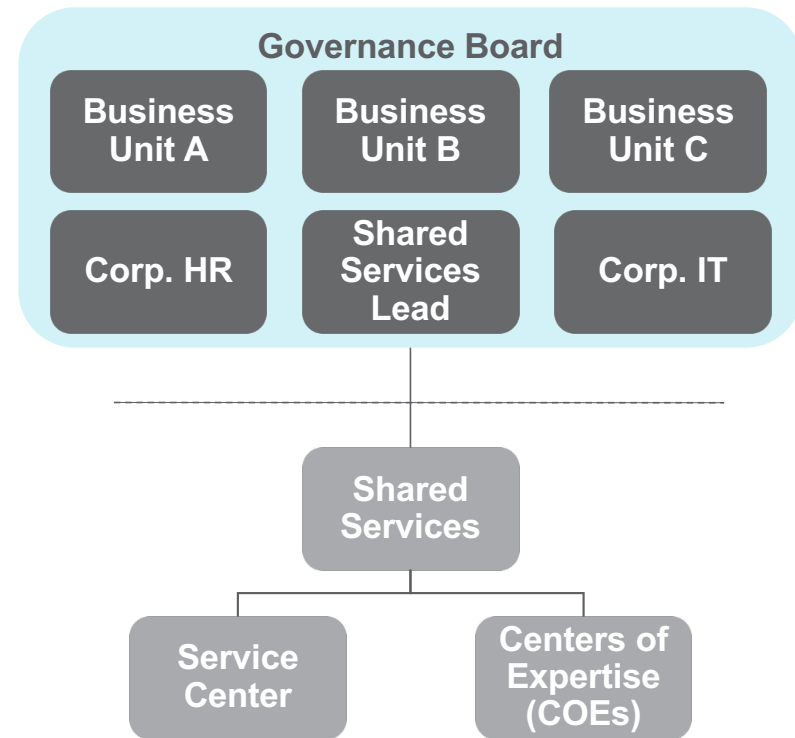


## Ensure Strong Governance Is in Place

Having a governance board is helpful to the success of your shared services model. The formality and participating members in a board are influenced by factors such as size of the organization, the number and complexity of services, organizational culture, and hierarchy.

### Key Benefits

- Provides direction to the operational team
- Serves as a point of escalation for issue resolution
- Represents the SSO among senior management
- Allows customers to strongly influence direction of shared services and ensures responsiveness to business needs
- Creates a formal process to control spending and prioritize initiatives
- Ensures integration with other business initiatives





## Align Work Type to Service Delivery Model

The nature of work should be evaluated and categorized to determine which primary delivery channel provides the service.



### HR Service Center (HRSC)

- Serve as the first point of contact for resolution of HR inquiries
- Provide transactional support for HR



### COEs

- Develop and deploy functional programs and policies to serve the needs of the employee community
- Provide functional support for HR services



### HRBPs

- Partner with the business in talent management and workforce planning to further the objectives and goals of the business
- Provide advisory, consultative, and strategic partnership for HR services



## Clearly Define Roles and Responsibilities – TA Example

### Corporate HR

- Determine recruiting and staffing strategy and standards
- Design policies, processes, programs, and tools

### Field HR

- Guide management
- Execute onboarding
- Determine needs
- Develop workforce plans

### Specialist Group

- Source and screen candidates
- Interview and evaluate candidates
- Attend career fairs/events
- Roll up workforce plan
- Select and manage staffing vendors
- Answer advanced questions

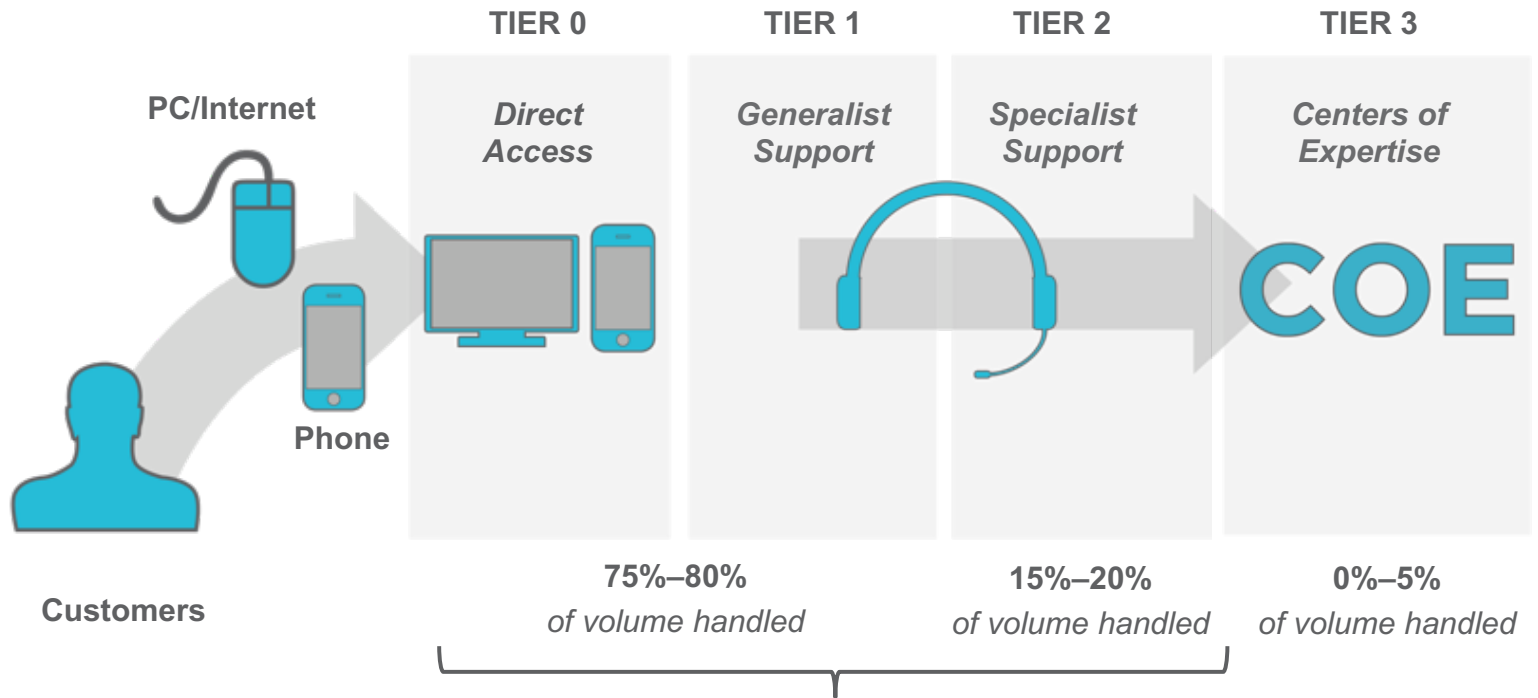
### HRSC

- Answer basic questions
- Schedule interviews
- Generate offer letters
- Coordinate background checks and drug screens
- Initiate new hire setup, complete forms, and enter data
- Collect and reconcile relocation expenses

# Leverage a Tiered HR Service Delivery Model



- ❑ Simplified customer experience
- ❑ Consistent and timely resolutions
- ❑ Increased operational efficiencies



Nearly all inquiries are resolved through direct access or the service center.

## How Do You Compare?

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**Do you have a governance model in place?**

- A. Yes
- B. No
- C. Planning to – not implemented yet

**Do you have “the right work in the right place”?**

- A. Yes – work is properly aligned to the right delivery channel
- B. Somewhat – some transactional work is centralized
- C. No

**Do you use a tiered delivery model?**

- A. Yes
- B. No
- C. Planning to – not implemented yet



## Elevated HRBP/Field HR Role



The transition of the field HR role from a traditional generalist to advisor and HR consultant is typically the greatest level of change and has the largest impact on the success of the service delivery model.

HRBPs remain focused on business and human capital strategies.

Manage Talent

Develop Leaders

Drive Performance

Optimize Work Life

Traditional Model

Transformed Model

STRATEGIC

5%

Realigned/Retained

20%

ADVISEMENT &  
FUNCTIONAL

30%

60%

TRANSACTIONAL

65%

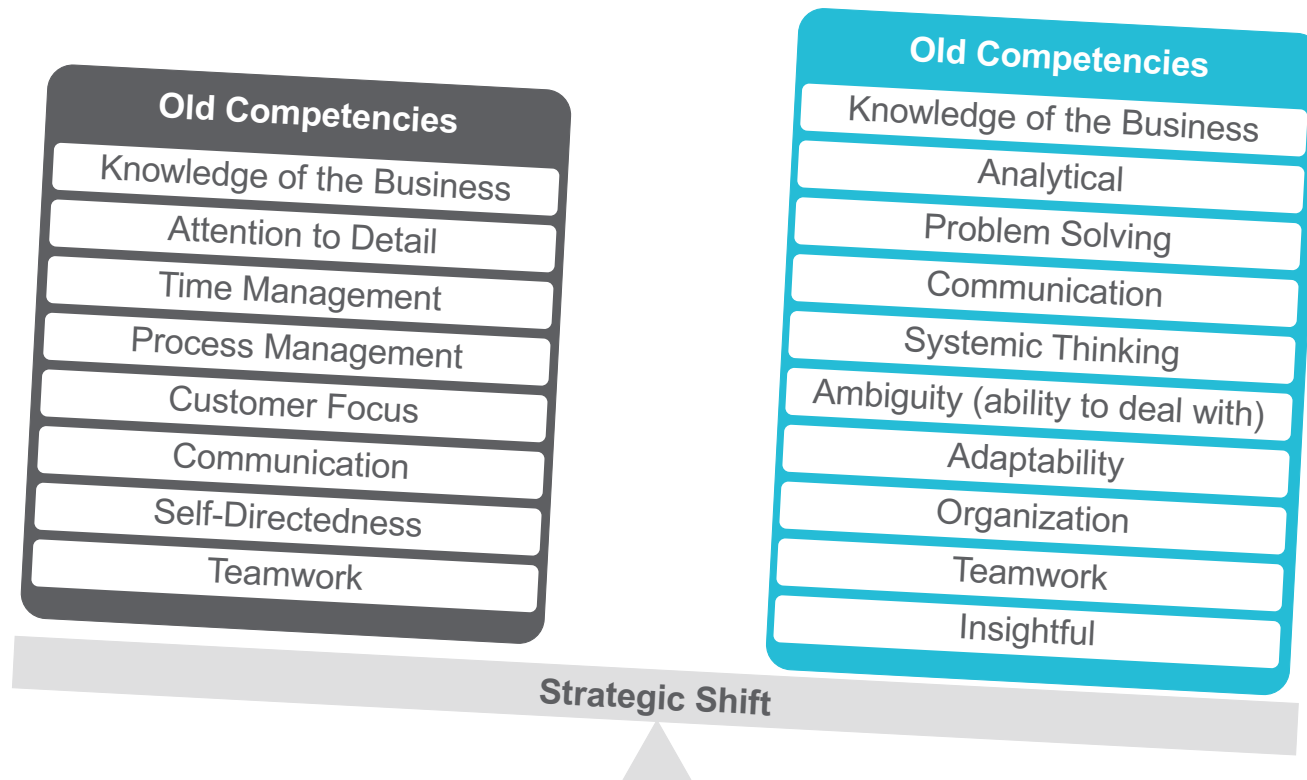
Transformed/  
Outsourced

20%

~45% of administrative  
workload shifts to the  
HRSC

## Optimize Your Field HR Competencies

Does your field HR staff have the right competencies to be strategic?



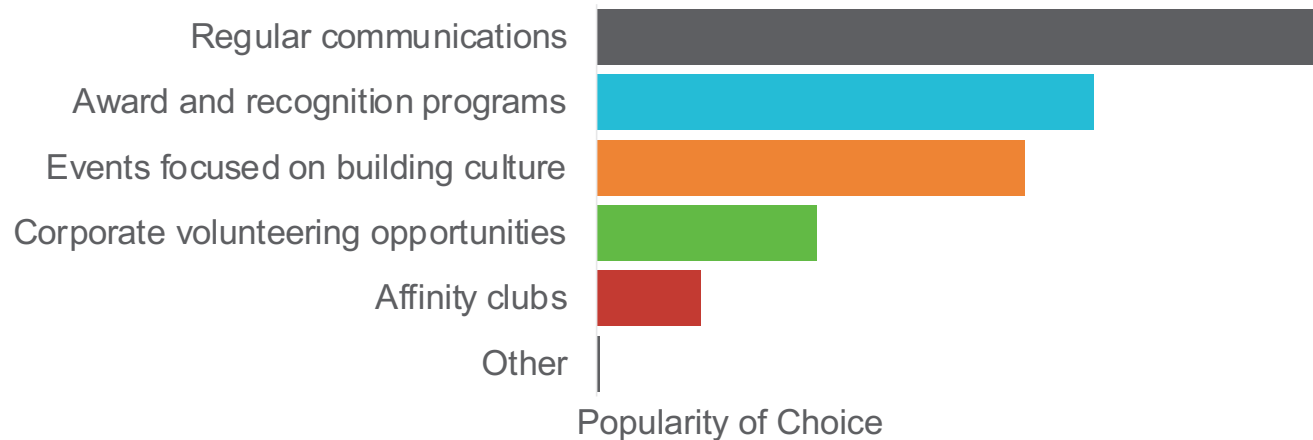
## Engage Employees



ScottMadden's SSO talent management survey identifies communication and recognition, and culture-building events as favored engagement tactics.

- Small SSOs indicate events focused on building culture are slightly more effective than award and recognition programs.
- Large and medium SSOs rank award and recognition programs as more effective.

### Which tactics are most effective for engaging employees and building culture within your SSO?



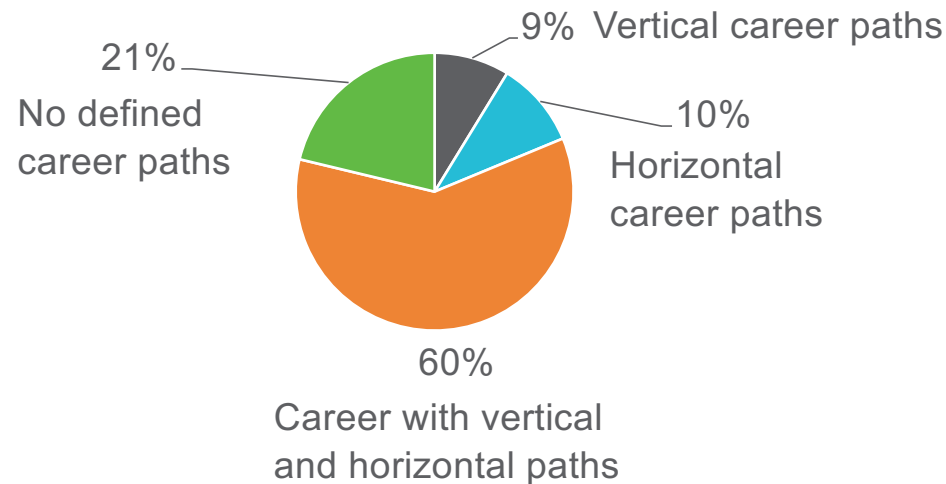
## Use Career Paths



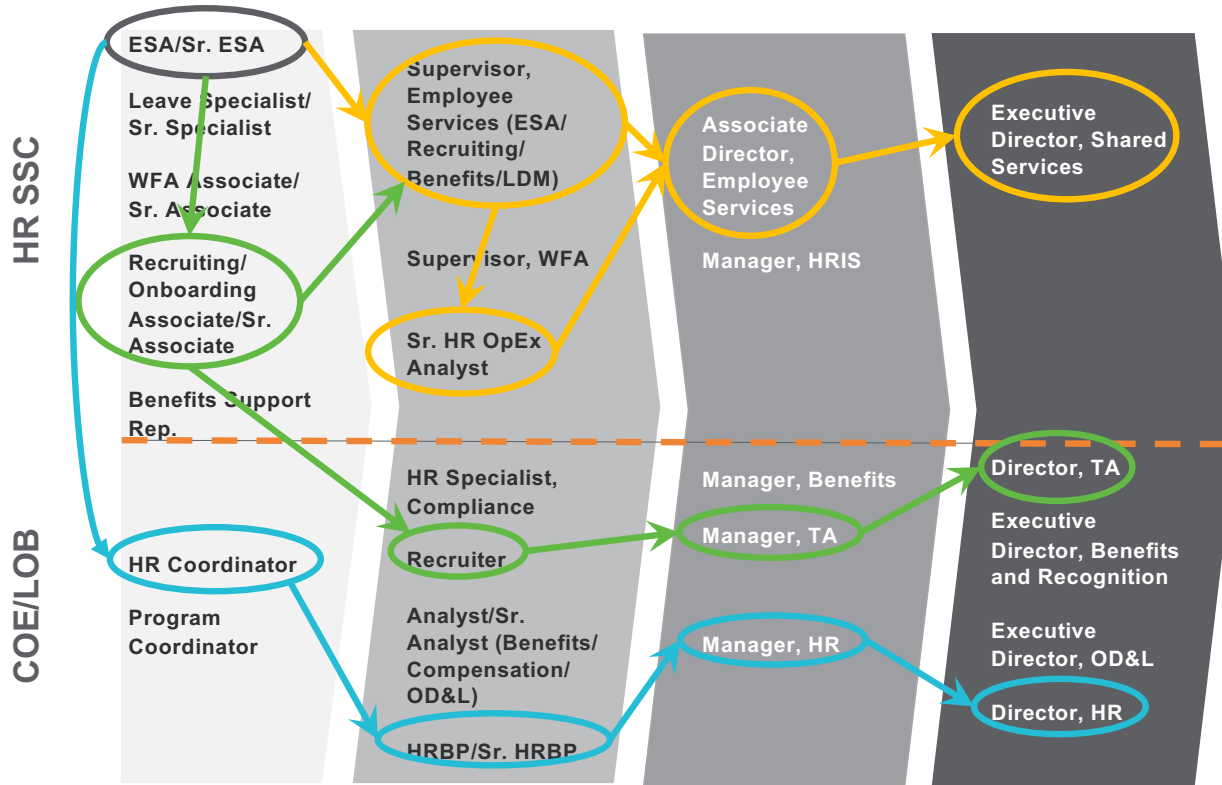
**Almost 80% of participants report having defined career paths for their SSO.**

- A mix of vertical and horizontal career paths is the predominate choice among all groups in the survey.
- Multifunction, less mature, and small SSO are less likely to have career paths.

### What best describes the nature of the career paths you have defined within your SSO?

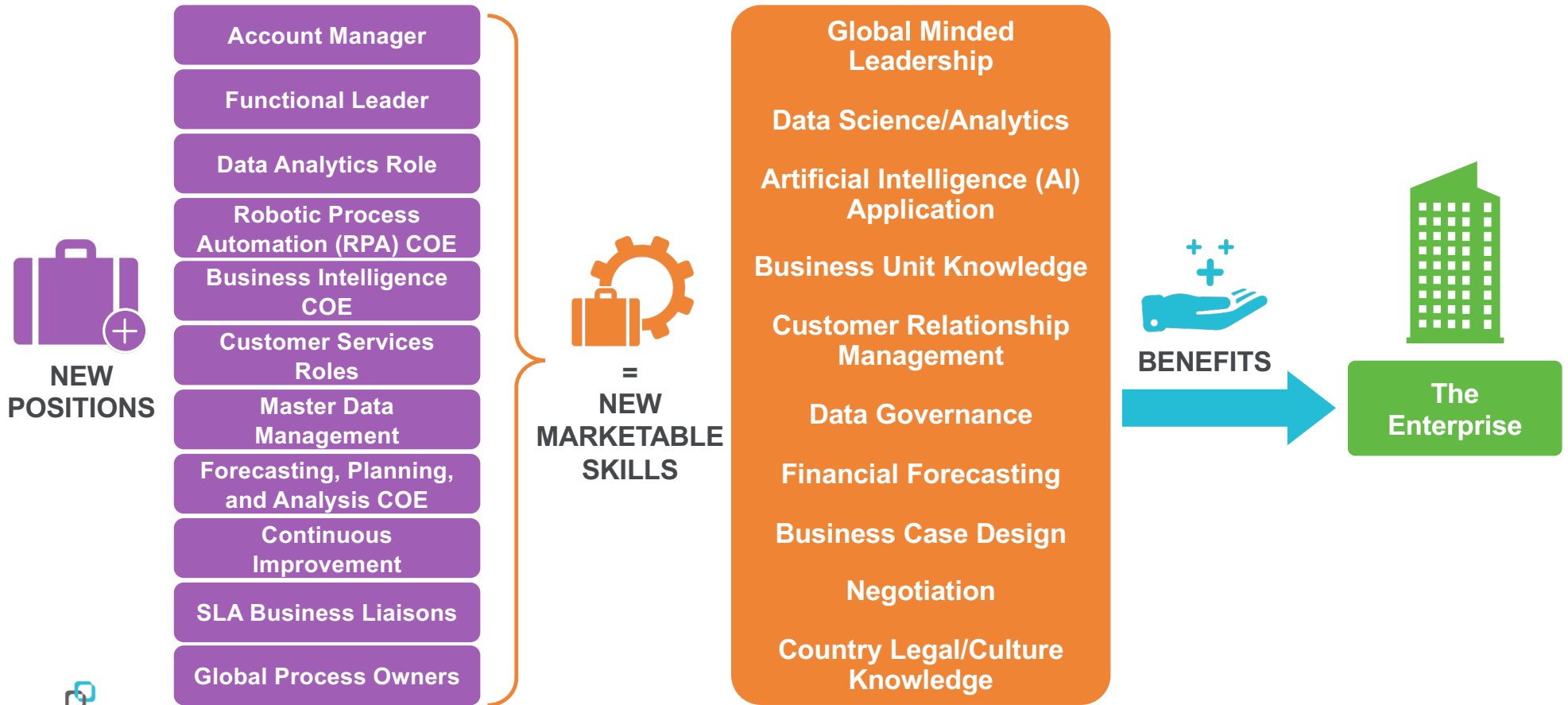


# Emphasize Career Development



The most effective career development provides opportunities for both vertical and horizontal career movements.

# Promote New and Marketable Skills Through SSO



## How Do You Compare?

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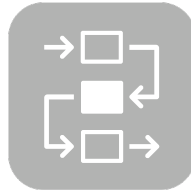
**Are your business partners serving as consultants to the business?**

- A. Yes
- B. Somewhat – but they are also still performing transactional activities
- C. No

**Do you have career development paths in place?**

- A. Yes – there are opportunities for lateral and vertical movement
- B. Somewhat – there are opportunities for vertical movement for our top performers
- C. No



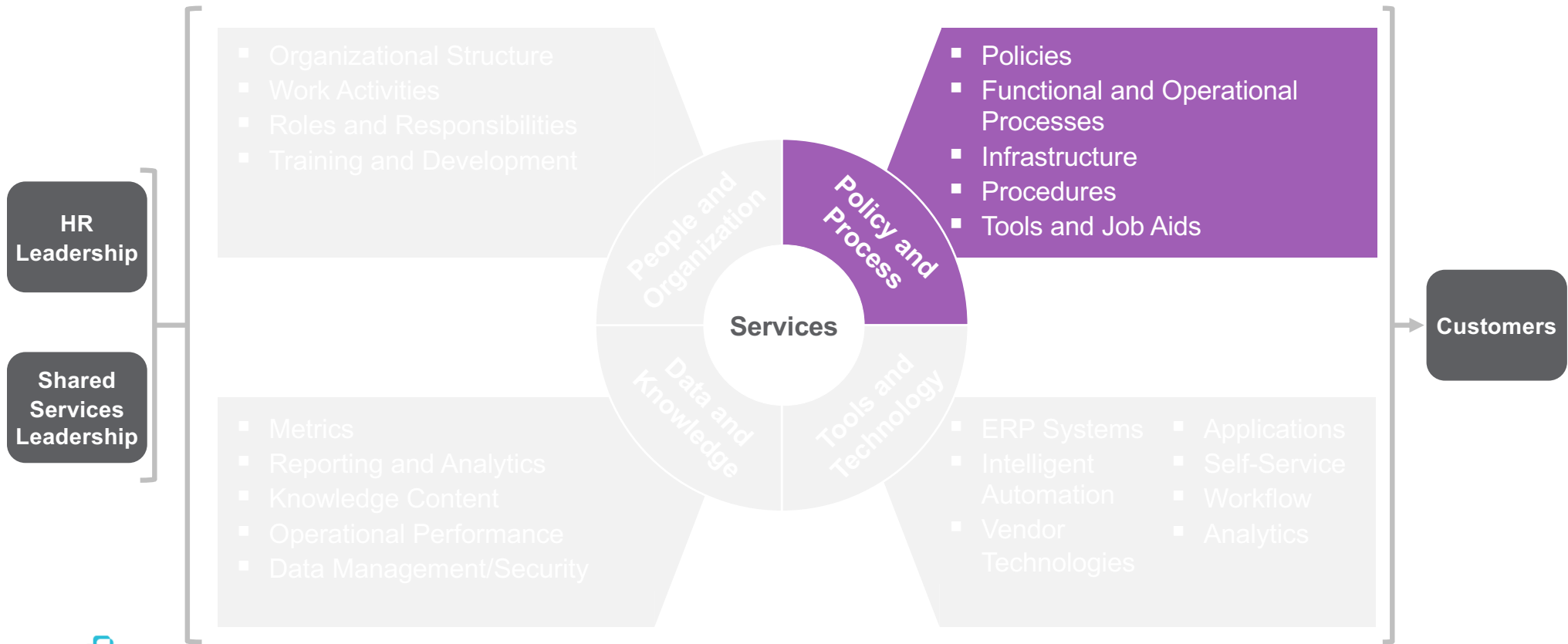


# Policy and Process

ASSESSMENT AREA FRAMEWORK



## Areas of Focus for Quadrant



## What Good Looks Like



### Scope of Services

- Clearly documented and agreed upon
- Strong governance over scope and service catalog
- Expansion strategy ties to organization strategy, goals, and objectives

### Policy and Process Maturity

- Harmonized and clear policies, aligned with company culture
- Standardized, simplified, and automated
- End-to-end processes with clear ownership

### Continuous Improvement

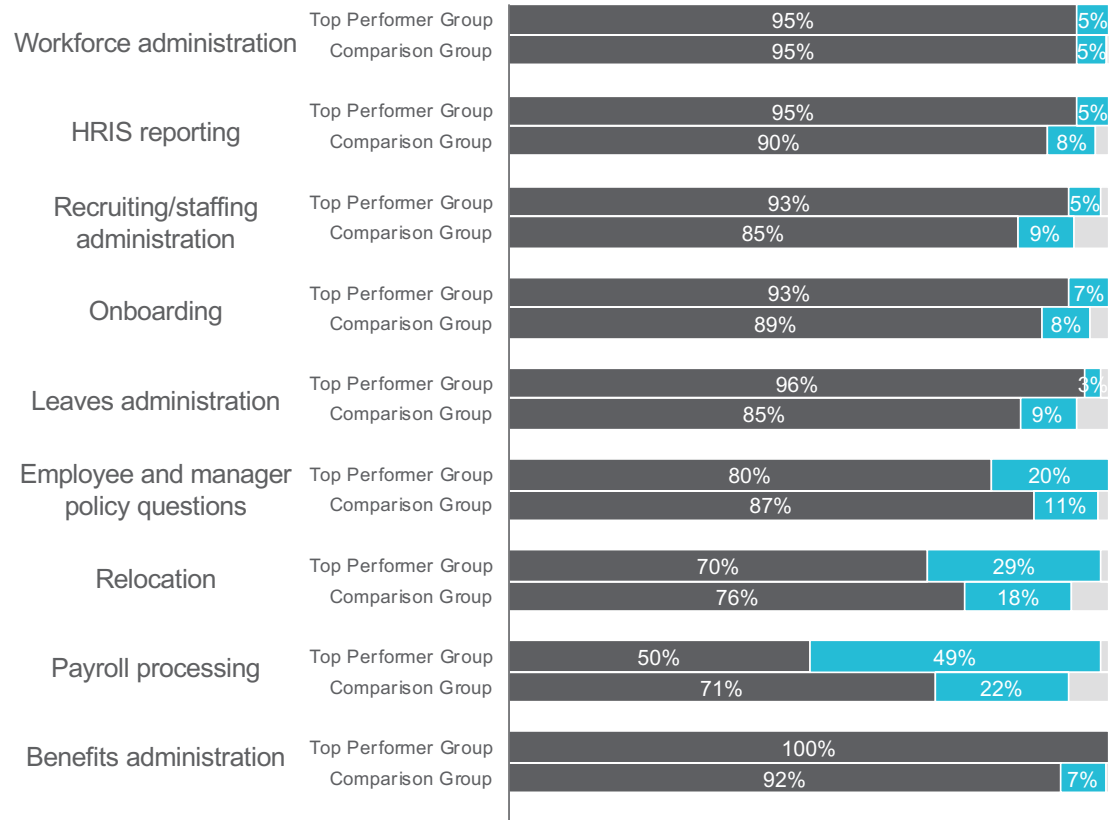
- Value add for the enterprise and shared services clients
- Initiatives managed and prioritized as a portfolio
- Standardized performance improvement methodology, including repeatable periodic benchmarking
- Automated key performance indicators (KPIs)

## What Good Looks Like (Cont'd)

Top-performing SSOs tend to have more services in scope and are more likely to outsource some of the services to third-party providers.



Service Scope



Yes – provided by in-house staff
  Yes – outsourced
  No

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# Key Levers for Policy and Process Effectiveness



**Defined and Evolving  
Scope of Services**



**Harmonized and  
Simplified Policies**



**Optimized  
Processes**



**Focused Continuous  
Improvement**



**Operational Teams  
and Toolsets**

## Set Scope of Services Strategy



# Develop Scope of Services



Who is CURRENTLY doing the work?

Who will be doing the work in the FUTURE?

When will the work TRANSITION?

Category	Sub-Category	Activity	Activity Type	Scope of Service Delivery by Channel				
				Self Service	HRSC	Field HR	COE	Vendor
Workforce Administration	General	Design workforce management strategies and standards	S				✓	
	General	Design workforce management policies and procedures	S				✓	
	Employee Files	Maintain employee files	T		N ←	x		
	Transfers	Manage employee transfers	O		N	✓		
		Diagnose, restructure, reduce, or reorganize departments, including a reduction in force (RIF)	S				✓	✓
	RIFs	Answer questions related to RIFs	T		N			
	Terminations	Initiate termination process	O	N			✓	
	Terminations	Enter severance and termination data and changes, complete form	T		N ←	x		
	Terminations	Perform severance package calculations (ex: PTO)	O		N ←	x A		
	Terminations	Produce severance package (benefit termination, severance letter)	T		N ←	x		
	Terminations	Deliver severance package to employee	O				✓	
	Terminations	Collect and process exit paperwork	T		N		✓	
	Terminations	Perform and analyze exit interviews	O				✓	
	Surveys	Design, distribute, and analyze employee engagement surveys	S					✓

**Keys to success:**

- ✓ Details
- ✓ Agreement

## How Do You Compare?

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Does your HR SSO have a clear and defined scope of services?

- A. Yes
- B. No
- C. We're working on it
- D. I'm not sure



# Understand the Difference Between Policy and Process



## POLICY HARMONIZATION

focuses on development and standardization of “**guidelines,**” “**standards,**” and “**rules**” around identified topics.

- What is allowed?
- Who is eligible?
- What are the parameters or limits?
- What are the requirements?
- What is the legal standard?



## PROCESS STANDARDIZATION

focuses on “**how**” a service is delivered.

- Who owns a task?
- How does a task get done?
- What tools, templates, and systems are used?
- Who approves?
- What stakeholders are involved?



Policy development drives process development

Prepare Appropriately

Push Sufficiently

Roll Out Effectively

## Determine Policy Strategy



### Bereavement Leave

Eligible employees may be granted up to one (1) week of paid leave in the event of a death in their immediate family. For purposes of this policy, immediate family generally is limited to the employee's spouse or domestic partner; and the employee's parents, children, siblings, grandparents, and grandchildren, including all legally recognized forms of those relationships (e.g. adoption, legal guardianship, *in loco parentis* status) as well as the "step-" and "in-law" forms of those relationships (e.g. sister-in-law and step-mother).

Up to a two (2) day leave with pay may be granted to eligible employees to attend funerals of close friends and relatives who do not qualify as immediate family members. In such cases, supervisor approval must be obtained and the granting of such leave is within the Company's sole discretion.

In cases of extreme personal hardship where more bereavement leave may be required, supervisor and HR approval must be obtained in advance of extending the leave.

Time taken for bereavement must be accounted for on a [PTO/Record of Time Used form](#), noting the appropriate code for bereavement ("BRV"). Bereavement days are not counted against an employee's PTO allowance for the year if the days are properly accounted for on the form.

Also, when Non-exempt employees enter their time in Time & Labor they should indicate that the days not worked were bereavement days, to ensure that the time is not counted against their PTO.



### Bereavement Leave

As a benefit-eligible employee, you may be granted up to five (5) days of paid leave in the event of a death of a close friend or family member.

For situations that require more time, please reach out to your manager or MyHR.

# Recognize Policy Harmonization Impact



Policy harmonization will...

Maximize the efficiency gains of an HR support model



Drive process design

Drive organization success by governing adherence to legislation and regulations



Reinforce a positive employee value proposition through engagement and increased transparency



Improve operational effectiveness and reduce errors

## “But Our Businesses Are Unique!”



### Determine Policy Exceptions

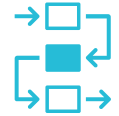
- Committee for policy review and approval
- Agreement on harmonization strategy
- Clear exception criteria for permissible deviations

### Create Policy Guidelines for Exceptions

Document specific exception criteria:

- Who is eligible?
- Under what circumstances are exceptions granted?
- Who must approve?
- How will they be communicated and documented?

## Develop Processes



Document redesigned processes using leading practices principles ensuring that:

- There are **single, enterprise-wide processes** – regionally focused at minimum.
- **Intake mechanisms** for each process are clearly defined.
- **Roles and responsibilities** are clearly defined.
- **Service-level agreements (SLAs) and cycle times** for process steps are captured.
- **Variation** among the processes is **minimized**.
- **Technology is leveraged** where possible to reduce manual intervention.
- **Customer experience** is considered throughout the process.

## How Do You Compare?

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Where would you say you are on the spectrum of policy harmonization and process optimization?

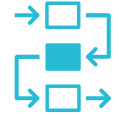
- A. We are streamlined and have very broad-reaching policies and standard processes.
- B. We have consolidated and improved and have fewer than we used to have.
- C. We have many different policies and processes as they apply to our different employee populations and businesses.
- D. We have a lot! Our policies and processes need some work.



# Optimize Processes



## Establish Process Ownership



### DEFINITION

Assigning accountability for implementing, maintaining, and revising a standard set of process documents necessary to achieve the objectives of a particular functional area

### WHY IS IT IMPORTANT

- Standardization and consistency are maintained
- Accountabilities are clearly communicated and embraced
- Creates transparency into process performance which is actively measured and managed

### PROCESS OWNERSHIP

- Documentation is accurate, consistent, cohesive, and integrated
- Procedures, tools and templates, and training materials are maintained
- Process performance is measured and improvement opportunities are identified
- Coordination with cross-functional stakeholders
- Execution of change management steps following process changes

# Ingrain Continuous Improvement



Continuous improvement uses performance measures to drive the implementation of an organization's strategy.

## PROGRAM CHARACTERISTICS

### An enterprise-wide management system:

- Aligns operations with strategy
- Ensures consistency
- Enables rapid directional changes
- Cascades vision, mission, values, and strategy

Strategy

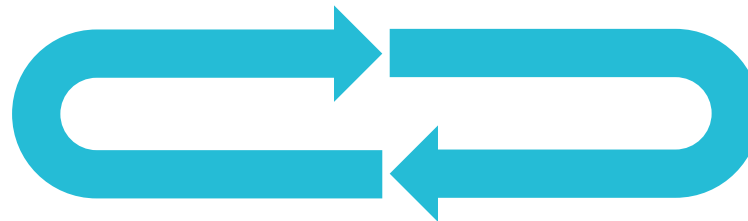


### An ongoing process:

- Focuses priorities and results
- Integrates measurement, analysis, and action
- Encourages continuous improvement
- Defines and reinforces accountability

*Set Measures  
and Targets*

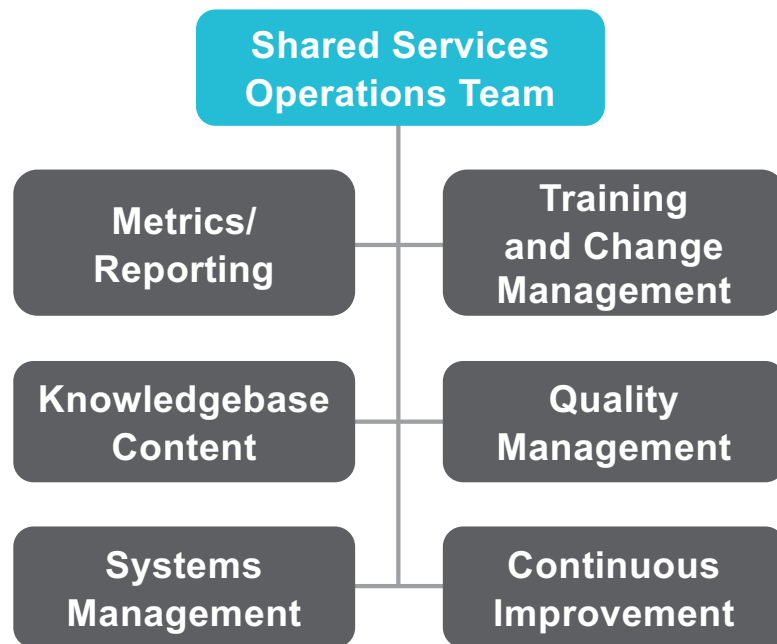
*Reward and Coach*



*Plan and Execute*

*Monitor and Evaluate*

## Leverage an Operational Support Team





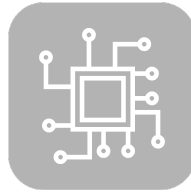
- Internal resource for the continuous maintenance and improvement of the service center
  - Monitors service center performance
  - Provides training to service center staff and customers
  - Ensures key systems and content are up to date and maintained

## Use Operational Management Tools



Operational management tools are used to manage the internal processes of the shared services center. Comprehensive operational tools include components of content management and employee management.

 <p><b>Content Management</b></p>	<ul style="list-style-type: none"><li>■ What is your queue management philosophy?</li><li>■ How are issues escalated from Tier 1 to Tier 2? What are the procedures?</li><li>■ Who owns updating employee, customer, or vendor portals? How often are they updated?</li><li>■ Who owns the content in the knowledgebase? How often is it updated?</li><li>■ How are improvements captured?</li><li>■ Do you audit internal operations?</li></ul>
 <p><b>Employee Management</b></p>	<ul style="list-style-type: none"><li>■ How do you manage downtime?</li><li>■ How are shared services resources scheduled to handle time zones and employee/transaction demand?</li><li>■ How is performance of employees measured? Do you use agent scorecards?</li><li>■ What is your quality assurance plan? How do you improve quality? Do you record and measure agents regularly? Do you train them?</li></ul>

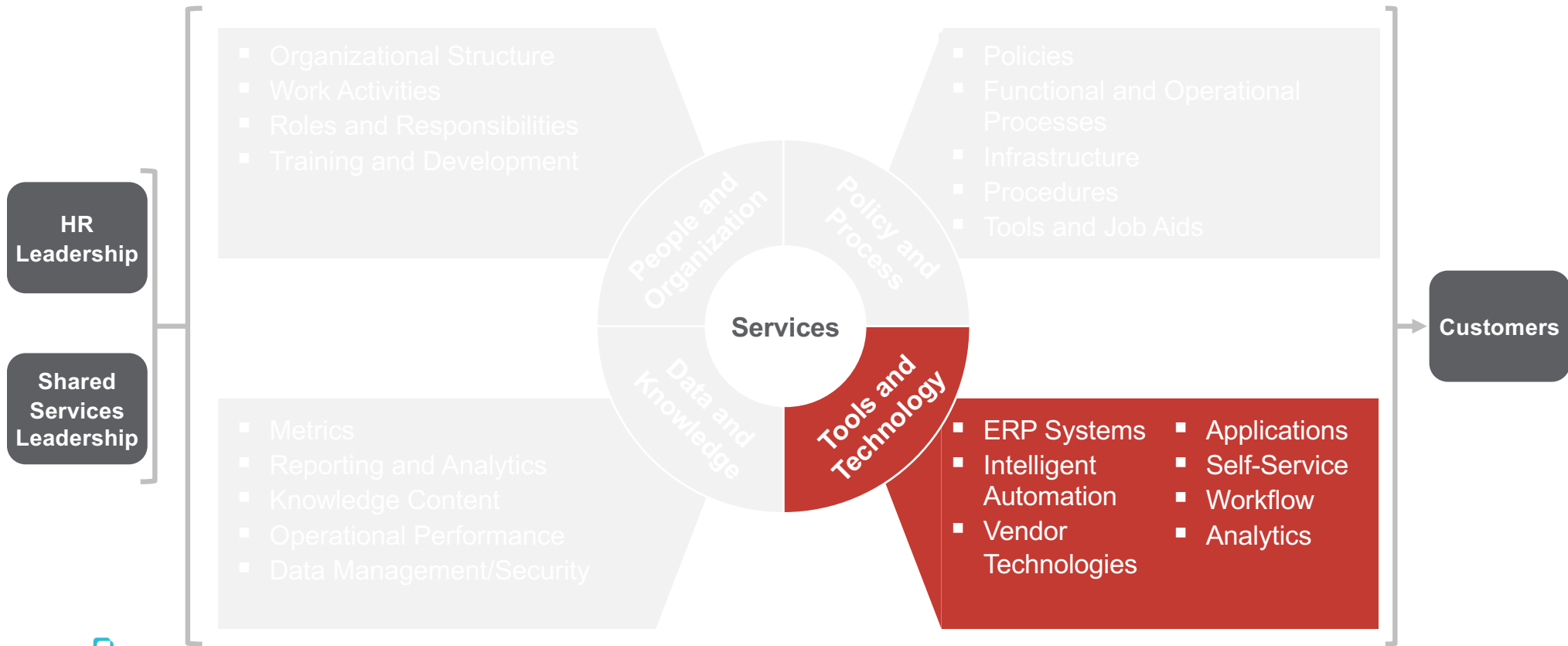


# Tools and Technology

ASSESSMENT AREA FRAMEWORK



## Areas of Focus for Quadrant

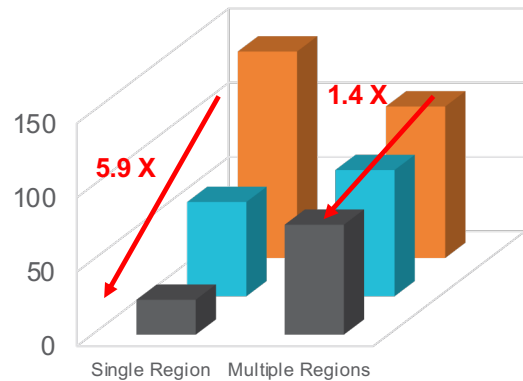


# What Good Looks Like

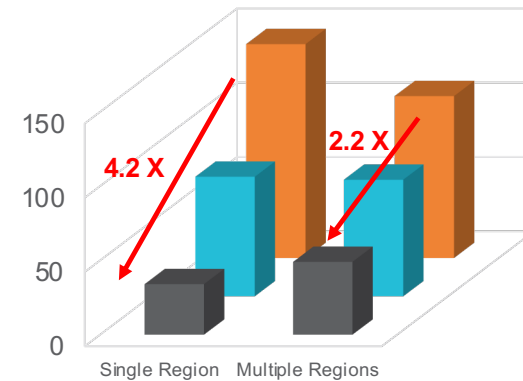


Technology standardization can have large cost benefits.

### Service Center In-House Cost per Transaction by HRIS Standardization



### Service Center In-House Cost per Call/Inquiry by Service Center/Customer Care Technology Standardization

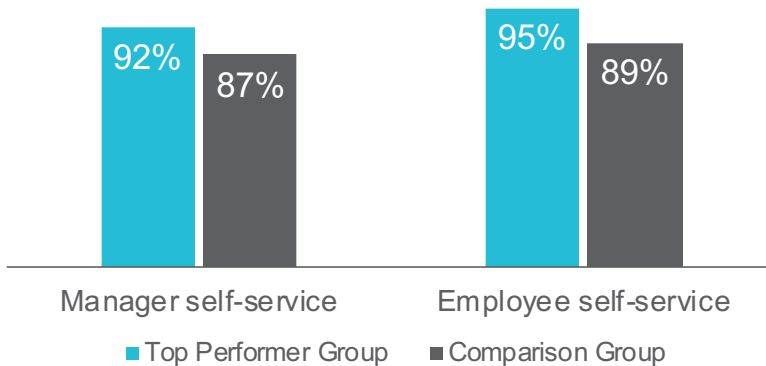


- Multiple tools used with some centers using standard tools
- Common tool used but different configurations for centers or regions
- Single instance used across all centers (full standardization)

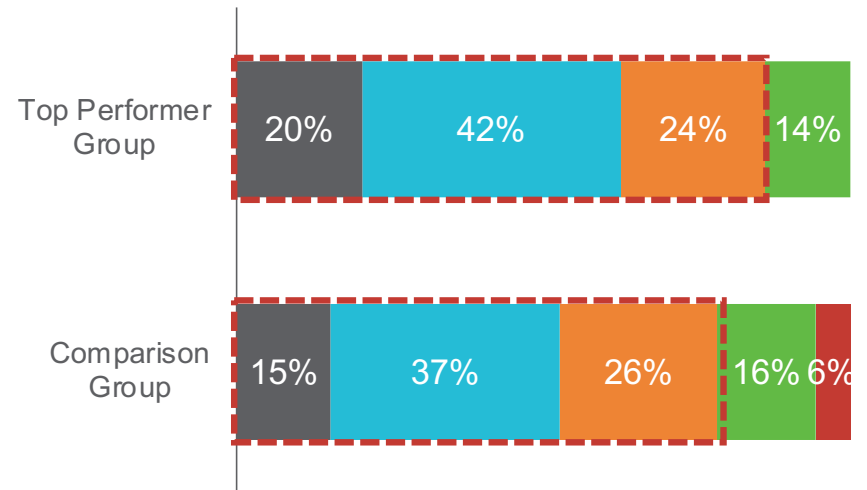
## What Good Looks Like (Cont'd)

- 62% of top-performing SSOs' HR portals contain personalized information with limited access to full-system integration.
- Self-service is the norm among both groups.

Use of Self-Service



### Which best describes your organization's use of an employee portal?



- Personalized content with full-system integration
  - Personalized content with limited system integration
  - Some personalization of content without system integration
  - Static, non-personalized content
  - Do not leverage a portal
- Robust Portal**

# Key Levers for Tools and Technology Effectiveness



**Single Access Point  
for Employees**



**Service  
Management**



**Technology  
Roadmap**

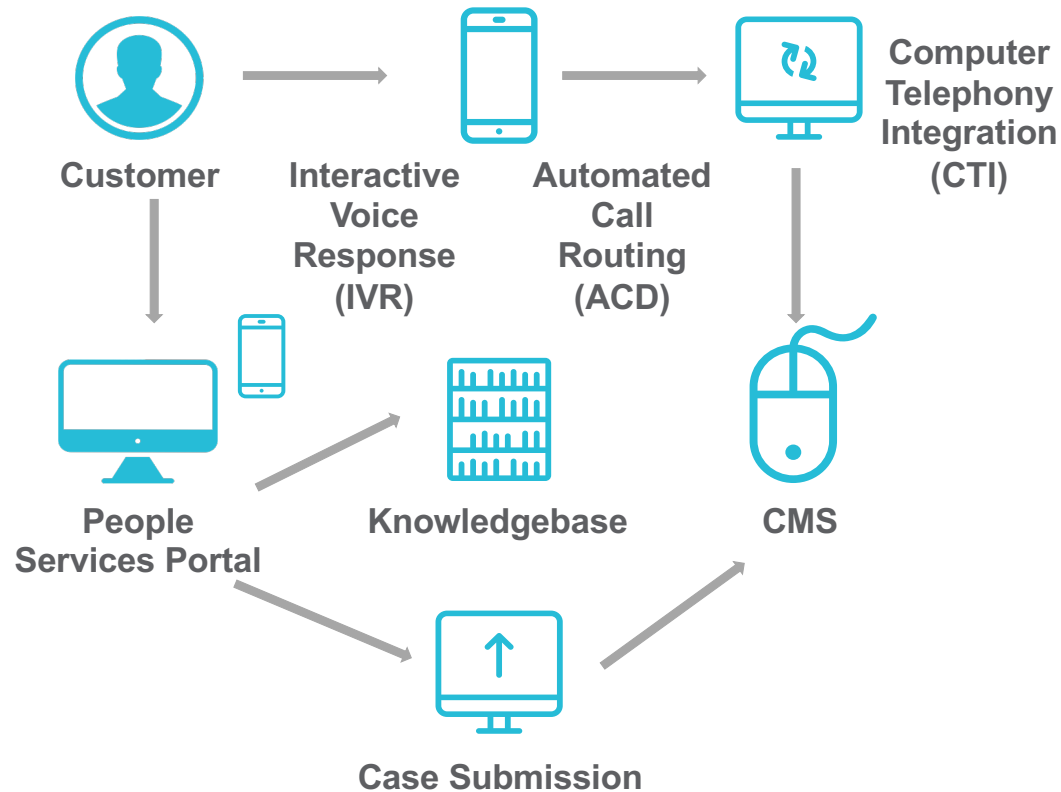


**Innovation**

## Leverage and Align Shared Services Technologies



Effective service delivery models will require improvements and investment in customer care technologies.



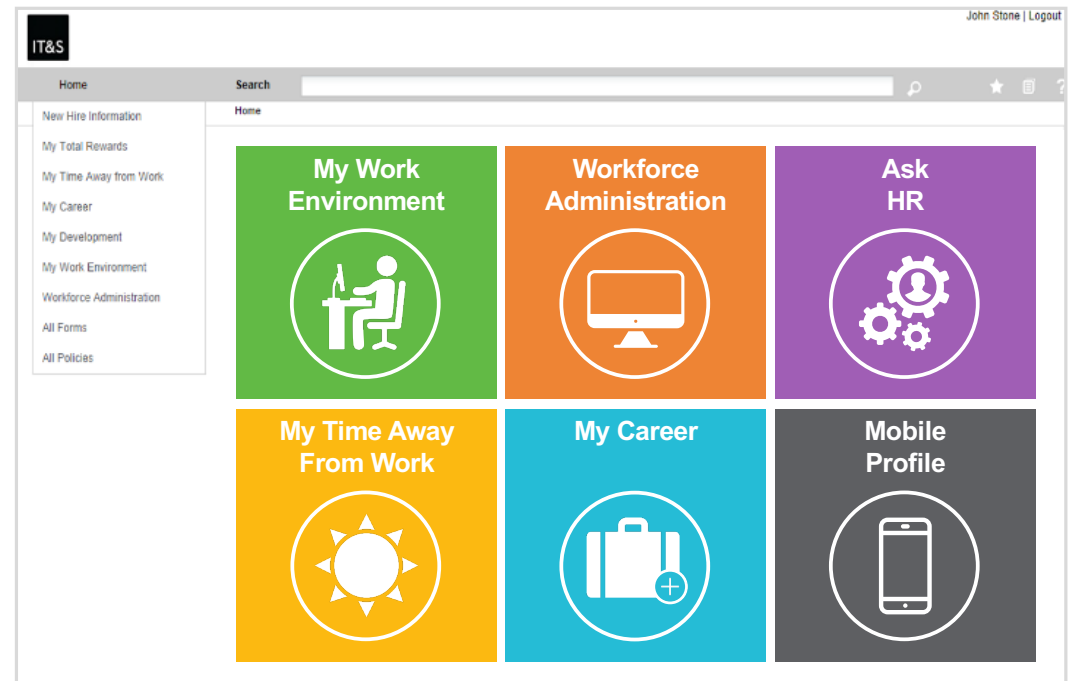
## Use Portals and Self-Service to Drive Efficiencies



Employee portals and manager and employee self-service drive organizational and cost efficiencies in HR SSOs.

- Top-performing companies average **2X** the number of portal hits per employee versus comparison companies.

Example HR Employee Portal



## How Do You Compare?

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How many of you have an employee portal in place as part of your HR service delivery model?

- A. Single, robust portal
- B. Single portal – could be better integrated
- C. Single portal – needs a lot of work
- D. Multiple places for HR and employee information



# Use Technology to Support Service Management



## Philosophy of Service



**Customer First**



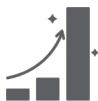
**Efficient, Self-Directed  
Work Teams**



**Performance Driven**



**Technology Driven**



**Continuous Improvement**



## Supporting Technologies

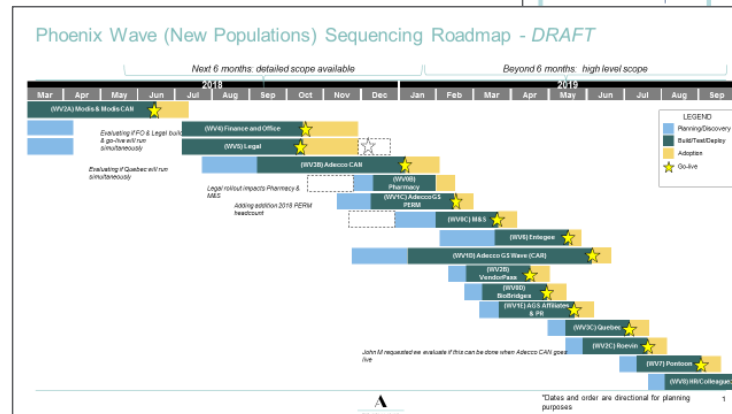
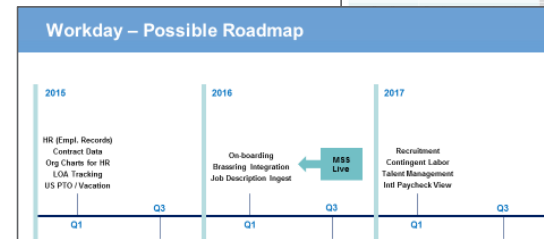
- One number, one portal, one email
- Answers from a knowledgebase relevant to caller
- Sharing of work through case management
- Increased accountability due to case management system
- Metrics gathered through integrated channel management and through case management
- Integrated technologies that reuse information and data
- Flexible technologies that will grow

# Build a Technology Roadmap



- Coordinate feedback received from customers and continuous improvement efforts alongside needs for the SSO
- Work with technology stakeholders to ensure thoughtful execution of the roadmap
- Stay current through implementation of system upgrades and application of frequent enhancements and improvements

HR Systems Roadmap – By Function							
Function	Definition	US (Current)	Int'l (Current)	US (Future) / Timing	Int'l (Future) / Timing	US (Future) / Timing	Int'l (Future) / Timing
Recruitment	Requisition, job postings, tracking candidates, etc.	BrassRing	BrassRing	Workday	Q1 2017	Workday	Q1 2017
On-boarding	Completion and submission of new hire documents	Equifax	Manual / Paper Forms	Workday	Q1 2016	Workday	Pilot Q3 2015
Job Descriptions	Electronic repository for job descriptions	ShareNetwork	ShareNetwork	Workday	TBD	Workday	TBD
Account Administration	Provisioning of user accounts for Web systems/applications	Novet-Forms	Novet-Forms	TBD	TBD	TBD	TBD
HR (Empl Records)	Positioning, job history, compensation history	PeopleSoft	PeopleSoft	Workday	Q1 2015	Workday	Q1 2015
Contingent Labor Tracking	Tracking of temps, contractors, etc.	Various / Manual	Various / Manual	Workday	Q1 2017	Workday	Q1 2017
		WFR	SageGuard / Other	Workday	Q3 2015	SageGuard	Q1 2015
		W (hosted)	SageGuard / Other	ADP / Workday	Q3 2015	SageGuard / Workday	Q1 2015 / Q1 2017
		W Time & Incentive	Various	OTA	NA	Workday	2018
		WFR	Various	OTA (partner / Workday (hosted))	Q1 2015	Workday	Q1 2015
		HRP (TW hosted)	e-C TOP (TW hosted)	Workday	Q3 2016	Workday	Q3 2016
		HRP (Paper Form)	Manual / Paper Forms	Workday	Q1 2016	Workday	Q1 2016
		Just. Tool	Salary Just. Tool	Workday	Q3 2016	Workday	Q3 2016
		Intus	Various	Cornerstone?	TBD	Cornerstone?	TBD



# Consider the Impacts of “Disruptive Technology”

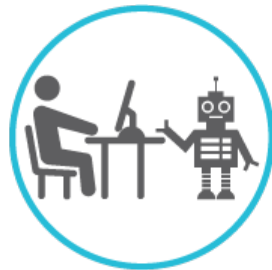


## Intelligent Automation Continuum<sup>1</sup>



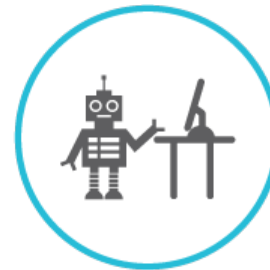
### Manual

Judgement-based  
Customer-focused  
Problem-solving  
Unstructured  
Value-adding



### Assisted

Repetitive  
Semi-structured  
Customer-facing  
Manually triggered



### Unassisted

Repetitive  
Rules driven  
Structured  
Schedule/event driven



### Cognitive & AI

Pattern-matching  
Unstructured  
Self-learning

The Future of Work is a hybrid of people and software applied in great ways.  
RPA is laying the foundation for Cognitive.

– Symphony Ventures

## Understand the Value Proposition of RPA



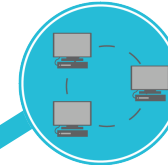
### Scalability and Flexibility

The ability to replicate robotic tools across geographies/business units increases scalability and flexibility.



### Productivity and Efficiency

Robotic automation tools are at least twice as fast as human FTEs and function 24/7.



### Compliance

Robotics allow data and processes to be retained on site.



### Accuracy

Automation phases out human intervention, thus reducing the possibility of human errors.

**Robotic  
Process  
Automation**



### Cost Savings

Robotic automation tools are up to 65% less expensive than offshore bases FTEs.

## Consider Virtual Agents



*“In a Few Words, Just Tell Me What You Need...”*

### Finance Applications



- Respond to policy questions
- Answer vendor questions on invoice status
- Answer questions on tax application
- Process accounting close items
- Answer questions on past due account status
- Obtain credit calculation information
- Answer T&E questions

### HR Applications



- Respond to policy questions
- Respond to HR questions (e.g., vacation balances, retirement funds, etc.)
- Process personal data changes
- Process leave requests
- Orient new hires
- Process recruiting requests

### Sales and Supply Chain



- Quote a price on a product
- Process a sales order
- Develop a purchase requisition
- Answer a material-tracking question
- Alter a shipping route
- Answer an inventory question
- Create a bill

### Information Technology



- Respond to policy questions
- Engage in troubleshooting dialogue
- Check credentials and assign user access
- Issue a password reset
- Answer questions on applications
- Collect information for IT requisitions
- Answer network connectivity questions

## Consider Virtual Agents (Cont'd)



HR is employing technology to optimize the talent acquisition process and create a seamless candidate experience. Less time will be spent on administrative tasks, with more focus on high-value work, including personalized candidate care and employer branding.

### Sourcing

Chatbots engage passive and active candidates in intelligent conversation via web, mobile, or social media platforms.

### Scheduling

Virtual assistants schedule candidates, reserve meeting rooms, send communications/ notifications, and process reschedule requests.

### Onboarding

RPA automates repetitive, administrative tasks, like generating offer letters, creating new employee records, and gathering needed documentation.



### Identifying

Automated data-mining technology reviews social profiles to identify top candidates.



### Screening

Automated text conversations ask specific questions to evaluate qualifications and identify top candidates for open positions.



### Engaging

AI communicates with an unlimited number of candidates through text and chat to answer questions and provide insight on job opportunities.



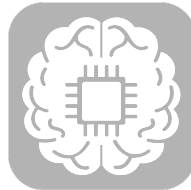
## How Do You Compare?

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**Do you have RPA in place in your HR SSO?**

- A. Yes – have one or more processes automated through RPA
- B. Yes – working on development now
- C. It's part of our near-term plans, in the next one to two years
- D. No – that's in the future for us!



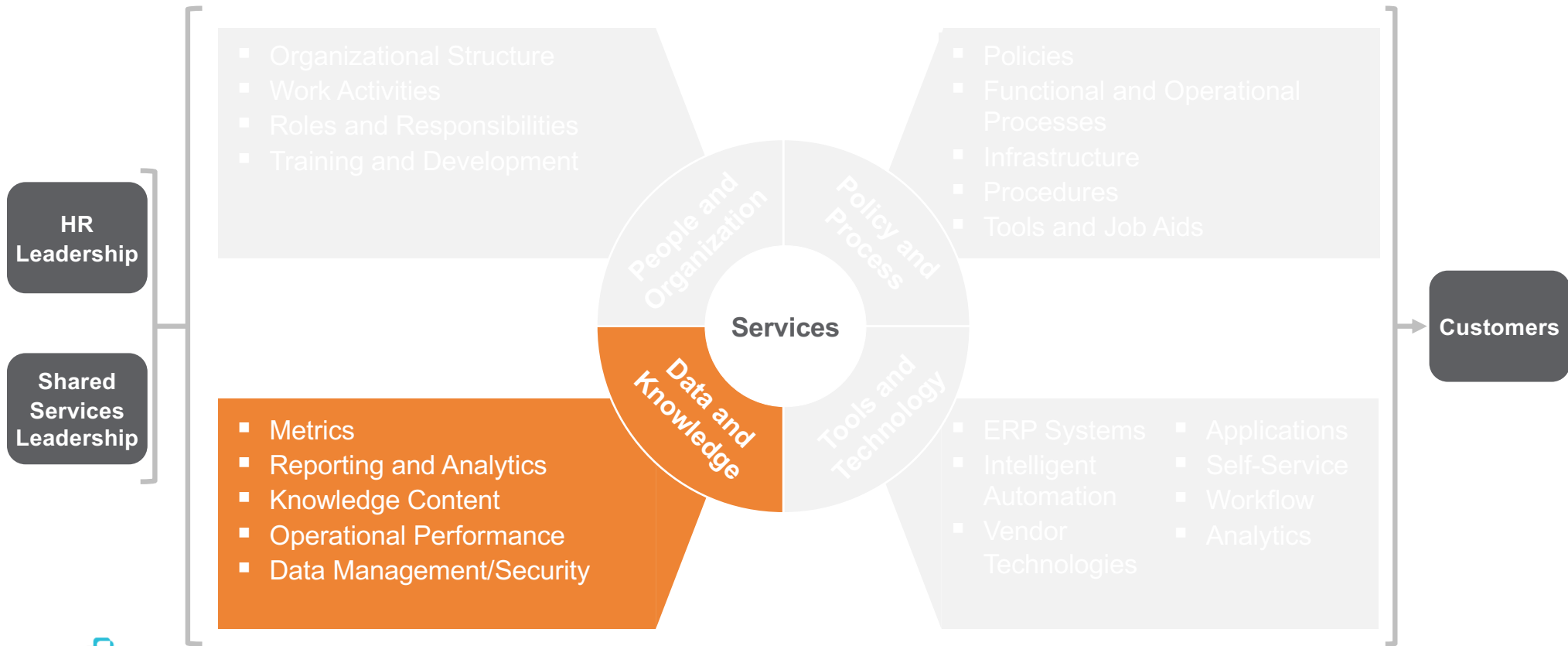


# Data and Knowledge

ASSESSMENT AREA FRAMEWORK



## Areas of Focus for Quadrant



## What Good Looks Like



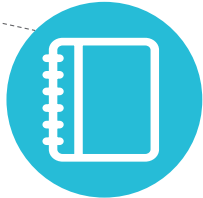
### Data and Information Management

- Data defined and definitions coordinated
- Source systems defined and enforced
- Master data centrally coordinated and managed



### Knowledge

- Documented institutional knowledge and know-how
- Structured methods for transitioning knowledge from retiring workforce
- Robust content management program
- Easily accessible, customer-friendly content



### Service Catalog

- Documented comprehensive catalog of services
- Services reviewed with customers and expanded as needed



### Operational Performance

- Savings are reinvested or returned to the business
- Service levels and performance targets are established with input from customers
- SLAs are simple with objective measures
- SLAs provide clarity on roles and responsibilities between customers and providers

# Key Levers for Data and Knowledge Effectiveness



**Knowledge via Portal**



**Service Catalog**



**Service-Level Agreements**



**Metrics and Reporting**



**Customer Feedback**



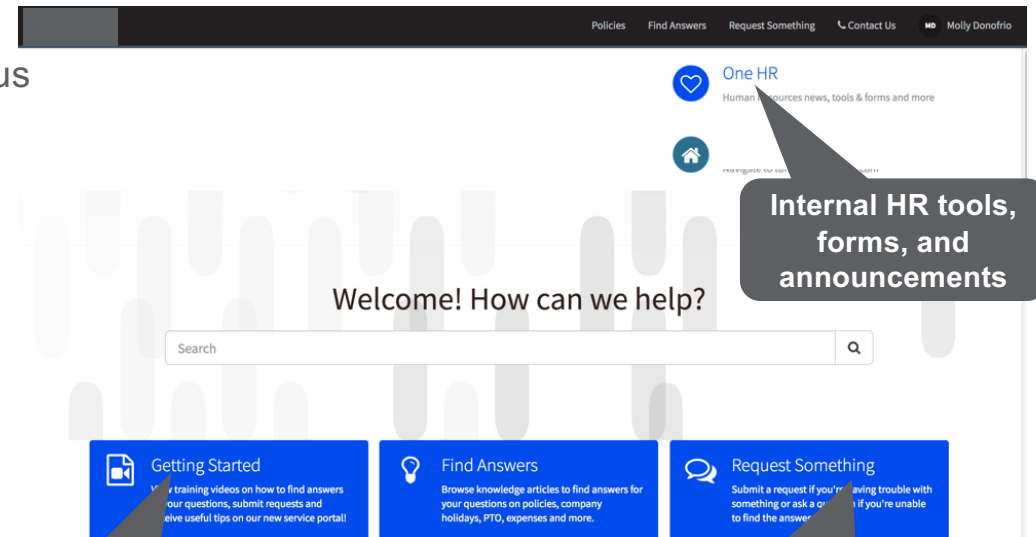
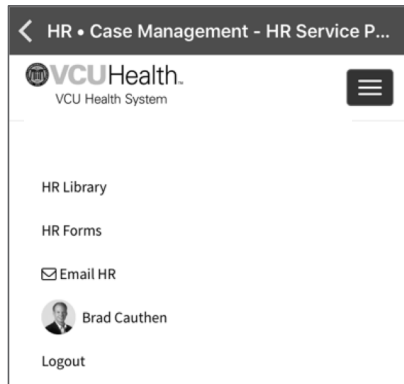
**Analytics**

# Leverage an Employee Portal for Knowledge Content



Employee portals with readily accessible, relevant information result in higher customer satisfaction.

- Move toward self-service access to FAQs
- Reflect current policies applicable to individuals requesting service (e.g., full time versus part time)
- Information accessible by mobile



Internal HR tools, forms, and announcements

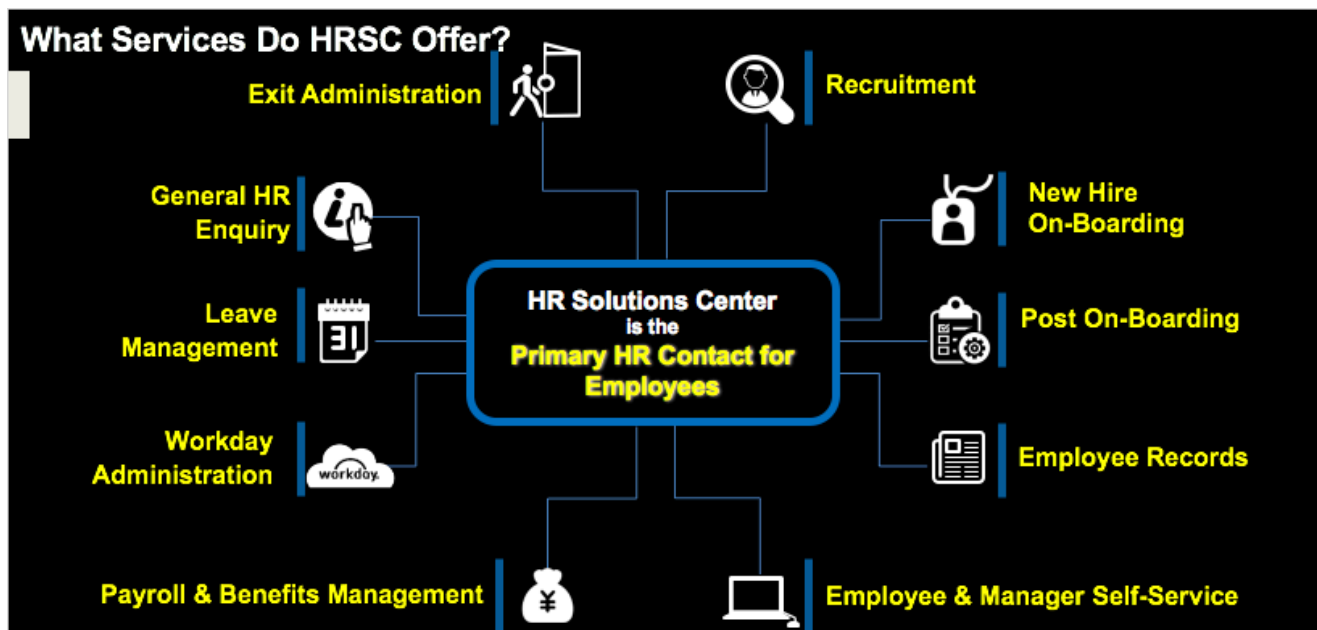
Users are provided answers to their questions

Entering terms into the search bar initiates a search in the knowledgebase and service catalog

Data and Knowledge

## Create and Provide a Service Catalog

Example: Online Service Catalog





## Service-Level Agreements

An SLA is between the provider of a service and a customer that quantifies the target quantity, quality, and cost of services to be provided in a future period. Dialogue, planning, and continuous improvement are outcomes that will drive your organization's success.

SLAs: A dialogue between a service provider and a customer.



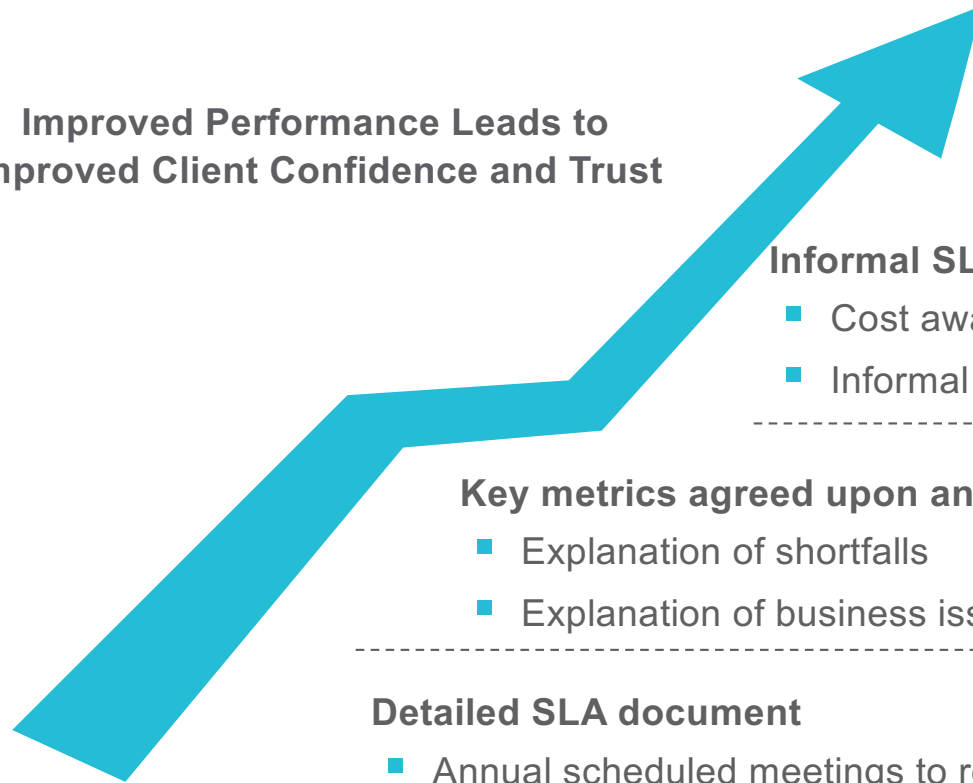
**SLAs are:**

- Concise
- Negotiated, not dictated
- A vehicle for understanding and managing demand
- A basis for regular discussions with customers
- Updated as necessary (typically annually)
- Standard across internal customers with only business-justified exceptions

## Evolve to Informal SLAs



**Improved Performance Leads to  
Improved Client Confidence and Trust**



### **Informal SLA**

- Cost awareness to market
- Informal ad-hoc communications to explain issues

### **Key metrics agreed upon and reported**

- Explanation of shortfalls
- Explanation of business issues

### **Detailed SLA document**

- Annual scheduled meetings to revise

## How Do You Compare?

---

**Are SLAs an effective part of your HR service delivery model?**

- A. Yes – in place and fairly rigorous with documentation
- B. Yes – informal but well-understood
- C. We talk about SLAs and turnaround times, but people don't follow them
- D. No – we don't have them



# Develop Metrics and Reporting Capabilities



## Develop Metrics and Reporting Capabilities (Cont'd)



To understand and measure operational performance of the service delivery model, the HRSC should routinely monitor operational metrics by leveraging data provided by customer care technologies and feedback channels.



**Case Volume**



**Resolution Tier**



**Direct Access Usage**



**Service Level**



**Case Aging**



**Service Center  
Productivity**



**First Contact  
Resolution**



**Customer  
Satisfaction Rate**

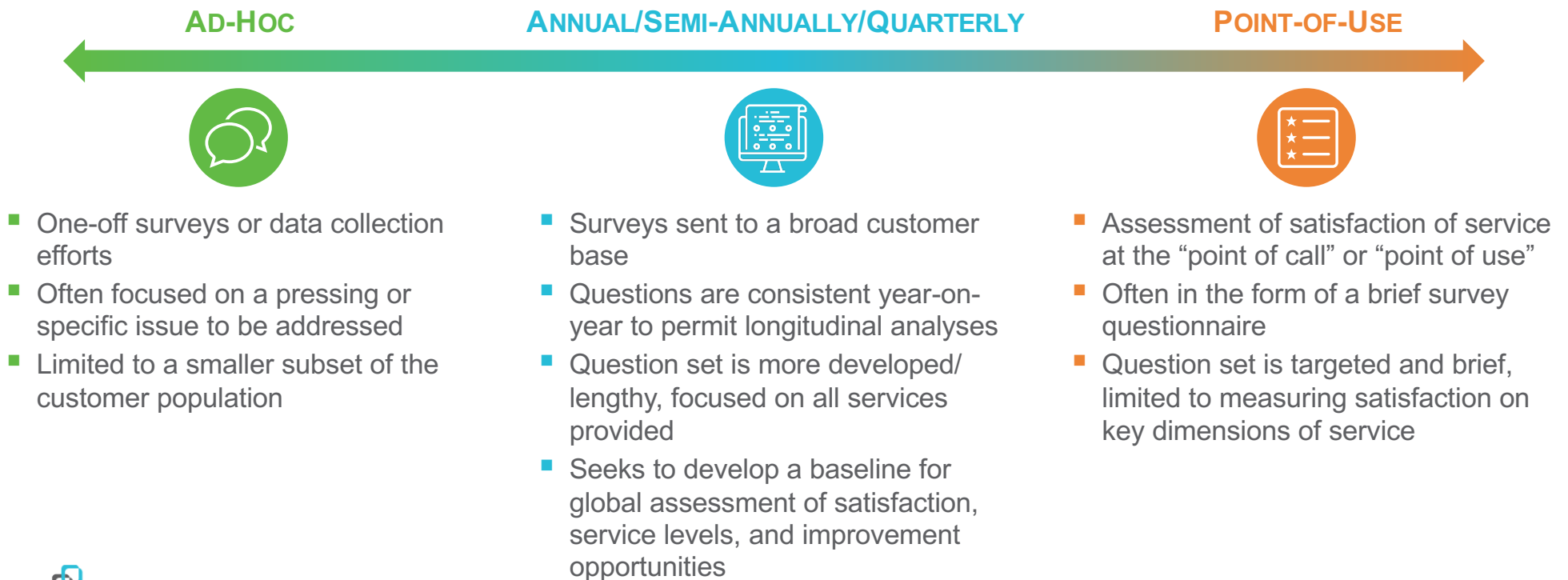


**Cost Effectiveness**

## Leverage Customer Feedback



As survey mechanisms are implemented, shared services areas implement a variety of layers to help create a holistic picture of performance and satisfaction.



## Evolution Toward Analytics



### Analytics vs. Metrics

- Analytics is not simply metrics...it is about driving insight and action.
- Analytics is quite different from metrics in the way it changes how a company behaves and reacts to data.

METRICS	ANALYTICS
Measures Performance	Enables decision making
Historical Look Back	Forecasting look forward
Data	Insights
Scorekeeping	Storytelling
Reporting	Understanding
Volumes	Selective
Reactive	Proactive

## Use the Data at Your Fingertips for Analytics

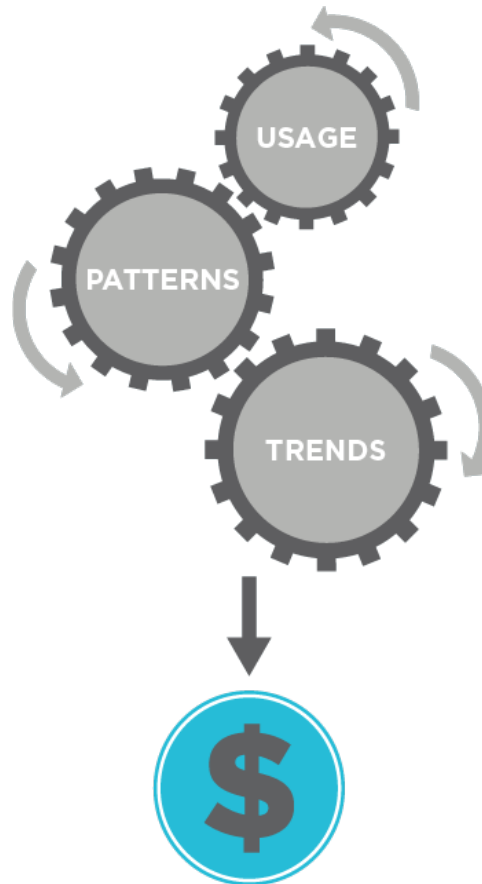


### Financial

- Customer credit risk
- Travel and expense trends
- Cash position
- Payment terms
- Debt interest rates
- Asset depreciation

### Information Technology

- Web hits
- Server volume patterns
- Handheld device patterns
- Portal usage patterns
- E-Commerce success
- Social media hits
- Data center peaks/valleys



### Purchasing

- Vendor quality scores
- Product demand forecast
- Category spend trends
- Inventory turnover/cycle
- Raw material patterns
- Administrative spend patterns

### Human Resources

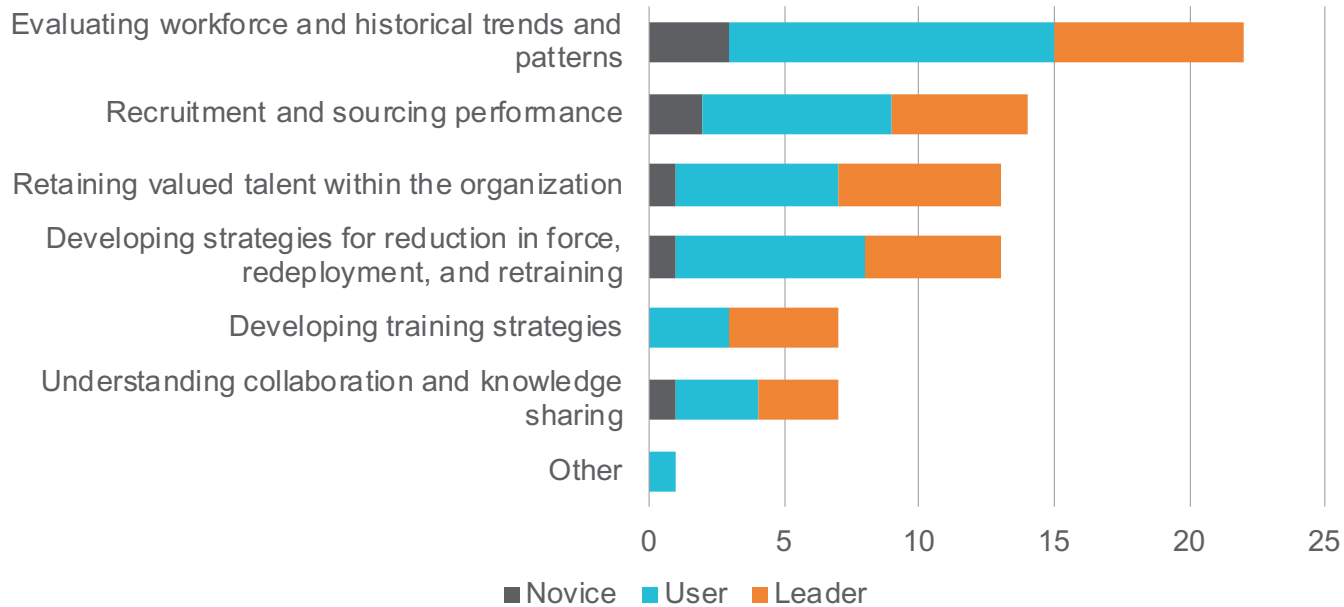
- Working patterns
- New hire trends
- Medical/disability usage
- Key competency changes
- Retirement demographics
- Time-to-fill positions
- Departure reasons/trends

## Use the Data at Your Fingertips for Analytics (Cont'd)



While data showed a majority of participants had an analytics function, the most significant activities performed were historical metrics vs. predictive analytics.

Which activities do you use HR analytics to support?



## How Do You Compare?

---

**Are metrics and analytics used for decision making and action in your SSO?**

- A. Yes – metrics are used to drive insight and action
- B. Somewhat – we can easily capture metrics and they are used for some analysis
- C. Not really – capturing metrics is very manual and time consuming, so our insights are limited





## What to Do Next



What to Do Next

## Report Out

Where are you on the curve? What are your greatest opportunities? What are your challenges?

