



scottmadden

MANAGEMENT CONSULTANTS

Smart. Focused. Done Right.®

Essentials for Change Management Success

HR Shared Services Transformation Summit

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YOUR DISCUSSION LEADS



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Agenda

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SCOTTMADDEN



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ESSENTIALS





Introduction to ScottMadden



Introduction to ScottMadden

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.

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

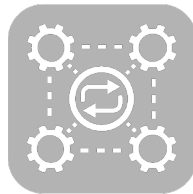
We have helped our clients with business case development, shared services design, shared services build support, implementation, and improvement.

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

Representative Clients

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

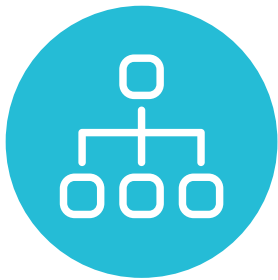
Note: Representative sample; not all-inclusive of clients served. Excludes numerous well-known clients due to confidentiality agreements



Shared Services Overview



Who Should Consider Shared Services?



WHO

Normally large, distributed organizations with multiple business units



SIZE

Typical...
>\$2.5 B in revenue
>10K employees

...But Works with Others
\$400M to \$270B in revenue
1.2K to more than 600K employees



INDUSTRIES

Shared services is industry agnostic and has been adopted across many industries

- Manufacturing
- Industrial products
- Consumer projects/ packaged goods
- Financial services/banking
- Technology
- Healthcare/pharmaceuticals
- Insurance
- Retail and wholesale
- Energy
- Higher education

Benefits of a Shared Services Model

Improve Service & Enable Scalability

- Standard processes
- Issue tracking and closure
- Performance metrics
- Common model for expansion



Gain Control & Leverage Data

- Data centralization
- Improved reporting and analytics
- Improved compliance
- Better decision making
- Demand management focus

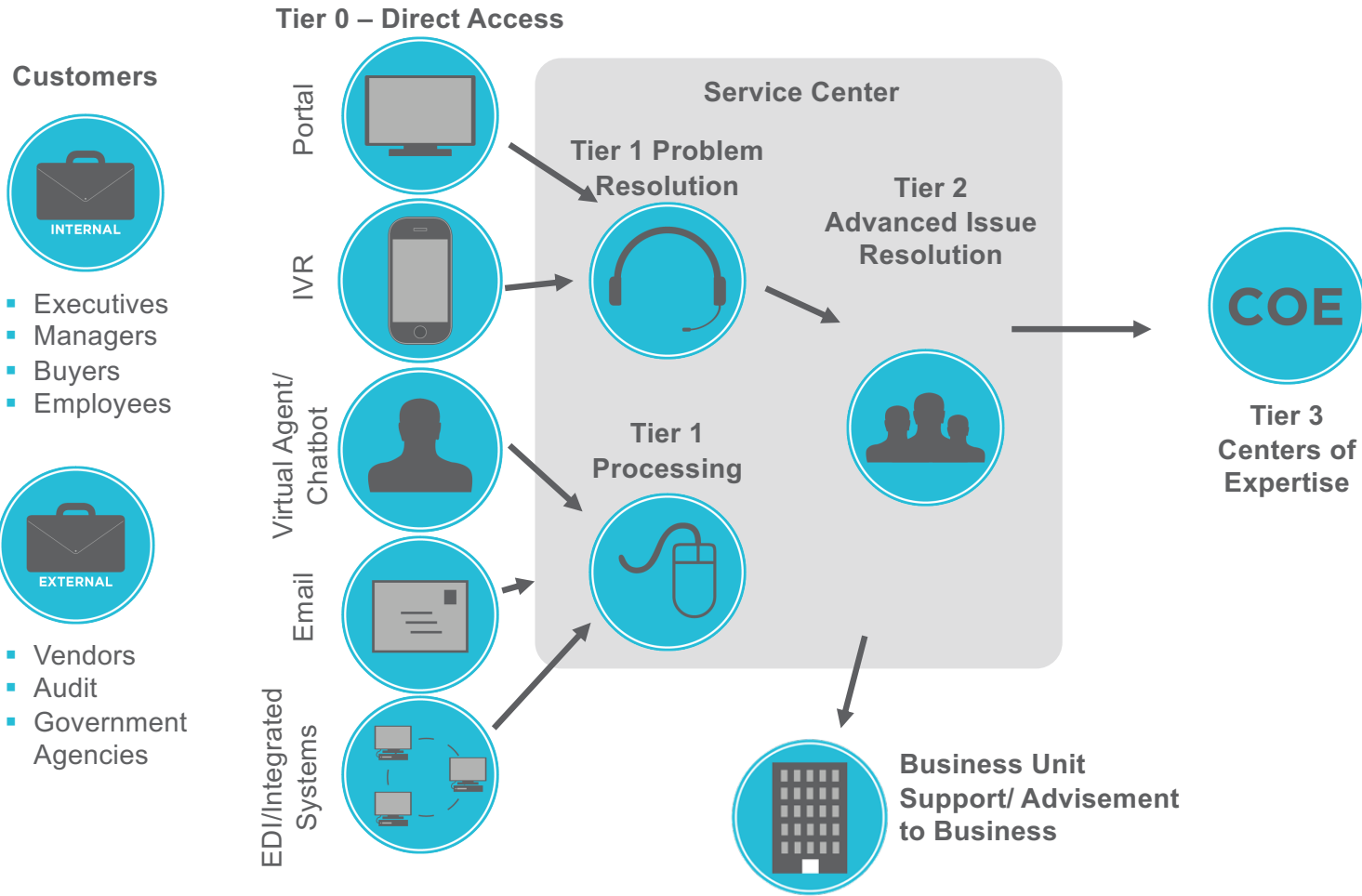
Cost Control

- Skillset and work alignment
- Economies of scale
- Elimination of redundant labor
- Automation of process
- Service usage and cost tracking

What Goes Wrong Without Shared Services?

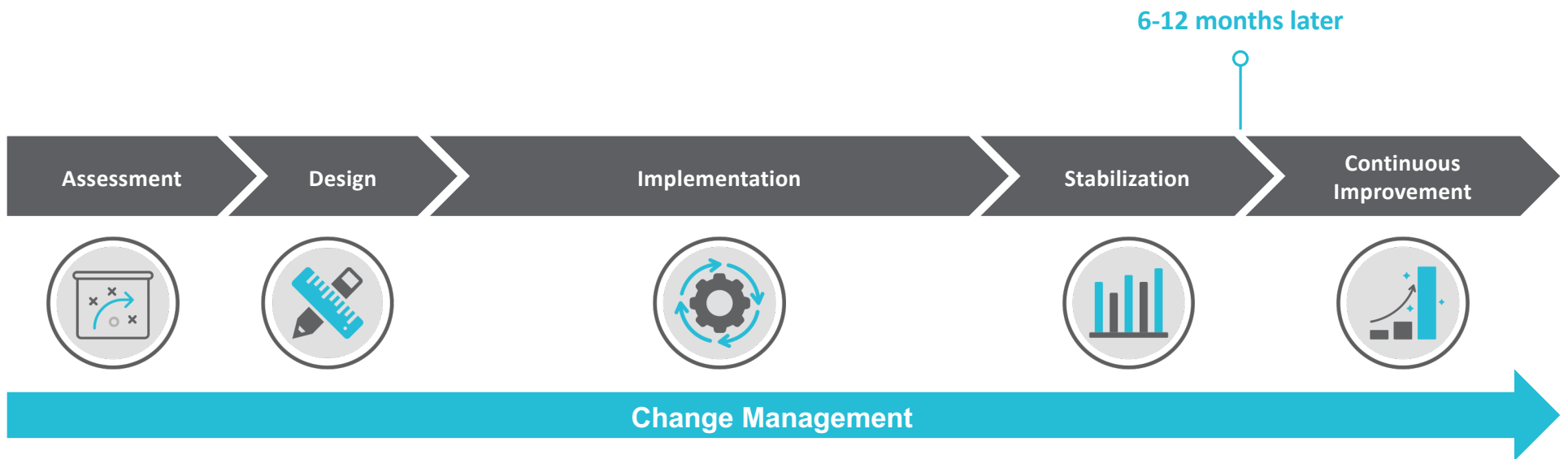


Leading Practices Service Delivery Model



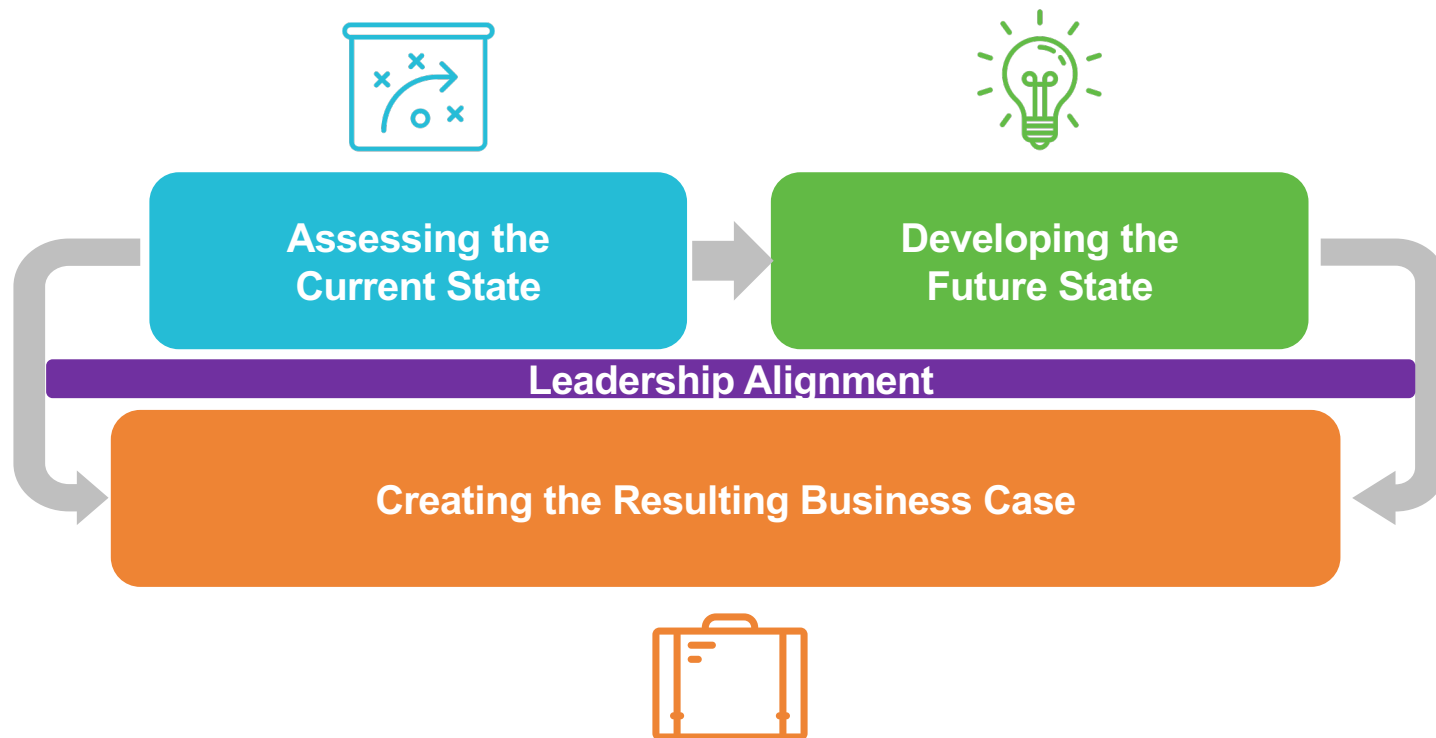
The Shared Services “Transformation Journey”

A successful shared services transformation goes through a variety of stages to successfully transition to a leading practice service delivery model. Change management is a critical component to all stages.



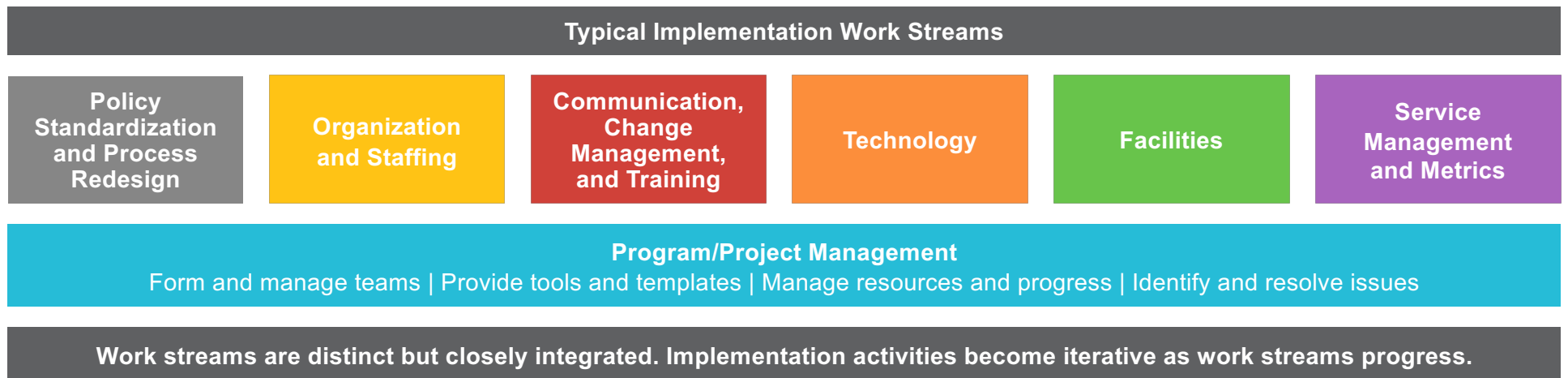
Assessment and Design

Before the business case can be created, it is important to assess the current state, develop the future state design and align stakeholders. The results of these steps are key inputs to the business case model.



Implementation

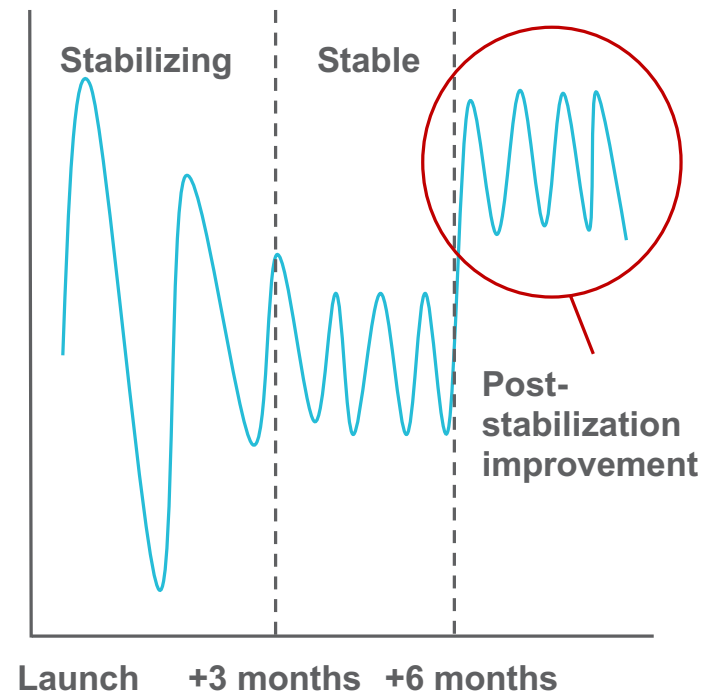
After the business case and roadmap are complete, service centers are built and launched. Implementations typically consist of major work streams and corresponding key activities.

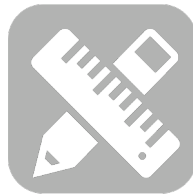


Stabilization

Once the new shared services organization is launched, it often takes three to six months to stabilize day-to-day operations

- Set expectations with internal customers
- Establish stabilization objectives and metrics
- Schedule recurring stabilization sessions with internal team members
- Consider a “tiger” team to address stabilization challenges while dedicated resources focus on delivering day-to-day work
- Meet with internal customers at standard intervals to update them on shared services performance and progress toward stabilization
- Apply learnings from change, communications, and training data; reinforce messages and training as needed
- Officially end stabilization activities at the appropriate time—left unmanaged, stabilization can continue indefinitely





Change Management Essentials



Where Change Management Misses the Mark

The standard change management approach begins with a change assessment, followed by the development of stakeholder maps, communication plans, and the copywrite of content, to help create awareness and communicate change for stakeholders, but often misses the mark

Change Activities



Change Readiness Assessment

- An initial assessment to identify how the changes will impact the organization, function, and key stakeholders



Stakeholder Mapping

- An exercise to identify all groups and individuals who have an interest in the outcome of the project



Change & Communications Plan

- A detailed plan documenting major project milestones, needed communications, target audiences, review timelines, and communication delivery methods



Copywrite Development & Distribution

- The creation, approval, and distribution of content aimed at stakeholders to help communicate the change, create awareness, and influence adoption

Standard Approach

Typical Oversights

Fails to consider the holistic change and desired future state ... activity looks at the individual changes as independent activities

Fails to continually include stakeholders in the discussion of how they are impacted and how their needs are changing ... activity is developed and monitored from a centralized project team and doesn't utilize up to date information

Fails to consider all accessible mediums to distribute communications ... activity is usually a formality, not strategic and results in change workstream being a catch-all for project fire drills

Fails to incorporate automatic feedback measures of impact from content ... development takes long, is over reviewed, and as a result is outdated at the time of distribution

Quantity Verses Quality

Communication Content



QUANTITY
— OVER —
QUALITY

Training Content



QUALITY
— OVER —
QUANTITY

A Consumer-Focused Approach to Change Management

Adopting an approach rooted in campaign management, with bought-in leaders at the top, leveraging tools that capture and analyze real time data, can enable a modern and agile approach to change management for the 'employee experience' focused organization.



**Structure, Roles
& Skills**



**Leadership
Alignment**



**Campaign
Strategy**

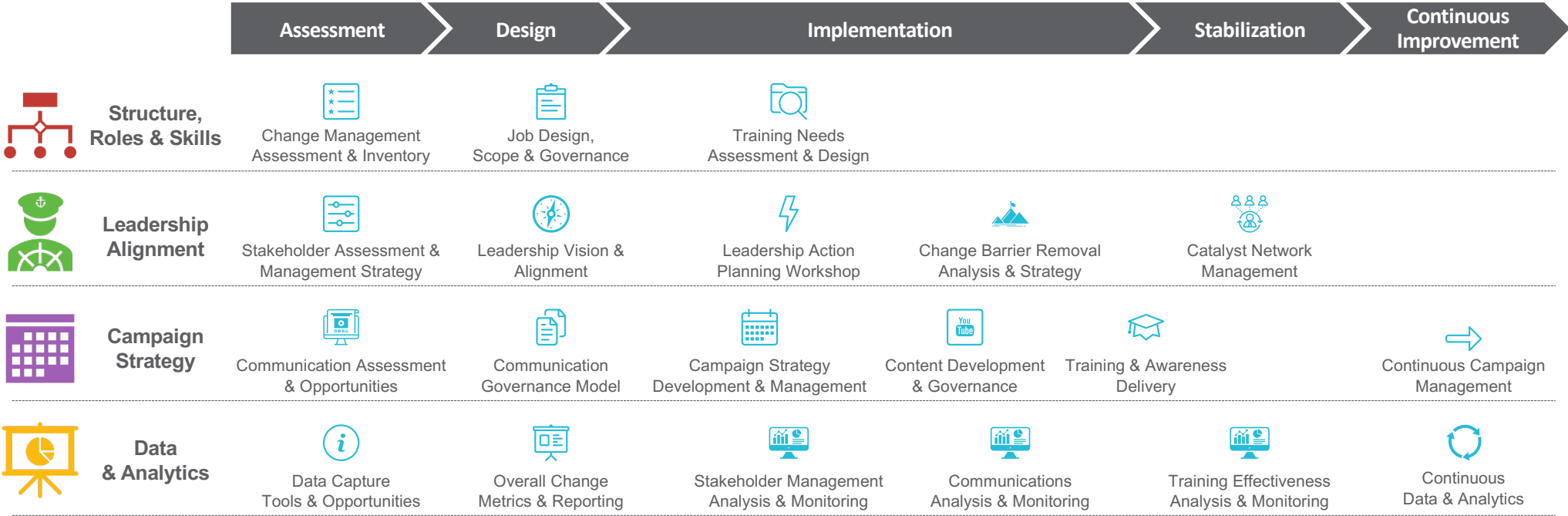


**Data
& Analytics**

As with the best consumer facing approaches continuously capturing data, analyzing trends and applying the learnings to drive targeted, tailored, on-demand and easily consumable content for audiences

Change Management Activities Accelerating Adoption

As the trend in ‘consumerization’ of the workplace grows, using consumer like technology while collecting and analyzing data throughout the “transformation journey” can help an organization catalyze change



Change Management Activity: Leadership Vision and Alignment

An aligned leadership vision is a practice that successful companies have in common. Telling the story of the experience users will have, and capturing it in an aligned vision upfront, supports success.

How it Works

- A structured workshop(s) with leadership to collectively define the vision and align on 'why' it matters to stakeholders
- The goal is to work as a group to generate as many ideas and storylines as possible and align on top themes
- Results in the creation of leadership-approved messaging for many types of communications content
- Approved communications content is then easily replicated and distributed across various channels

Structured Workshop(s)

The collage shows three worksheets from a 'Leadership Vision and Alignment Workshop' and a photograph of a workshop session. The worksheets are:

- What Attributes Matter to Hiring Managers?**: Instructions: 1. Using your sticky notes, list out what matters to Hiring Managers. 2. List as many attributes/emotions as you can. Example: Fast, engaging, fun, mobile, seamless, AI.
- Organize Attributes**: Instructions: 1. Take your sticky notes with the. 2. Together rearrange and organize. 3. Label the 4 - 5 groups.
- Vote on Top Attributes**: Instructions: 1. Take your three stickers and vote on your top attributes. 2. Can use your three votes any why you prefer. 3. Single out the top 5-7 attributes that received the most votes.

The photograph shows a group of people in a meeting room, standing around a table with sticky notes and a whiteboard, engaged in a workshop activity.

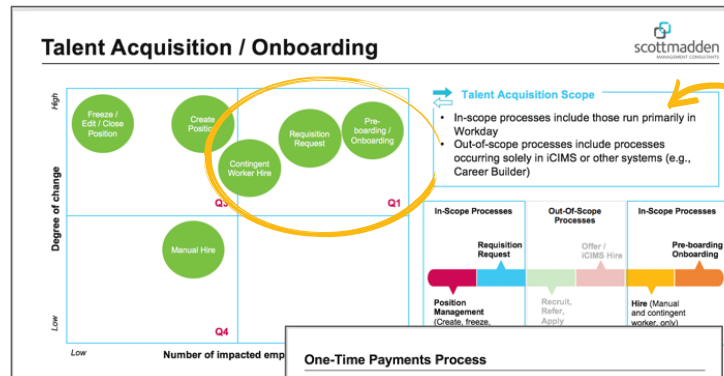
Approved Messaging

Change Management Activity: Training and Awareness Delivery

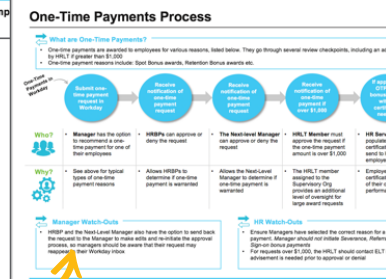
Adult learners have limited time and an even shorter attention span. Trainings should be short, to the point, and focus on the changes that matter most to each audiences.

How it Works

- Keep training sessions to 90 minutes or less
- Offer a variety of days and times for a training so participants have flexibility on when to attend
- Record the training and offer to participants afterwards as a reference tool
- Offer trainings in-person *and* virtually
- Consider the various shifts employees or vendors work and be available to teach them about the change



During the **Training Needs Assessment & Design** phase, map out which changes will be the most drastic and affect the most people



Reference materials

Top 10 Workday Responsibilities for HRBPs	
1. Create Position HRBP's are Approvers	<ul style="list-style-type: none"> • What is it? The process to add a new position to a manager's Supervisory Organization (SuOrg) in order to hire, promote, or transfer a worker into that position. It includes ADP, discussions with the management chain, local HR, and finance should take place before a manager Creates a Position in Workday. • What HRBPs should look for: Ensure that managers have selected the appropriate fields for their organization, including the Assign Org Changes Business Process, allows you to select union information or non-union information, GL code, and Mexico benefit code, if applicable.
2. Create Job Requisitions HRBP's are Approvers for selected requisitions	<ul style="list-style-type: none"> • What is it? HRBP initiates the review and approval for requisitions for new and replacement roles. After a requisition has been approved in Workday, Talent Acquisition can begin the recruiting and staffing process in ICIMS. Requisitions for existing, non-manager, roles requiring existing positions do not require additional level of review and approval. These will flow to ICIMS via an integration where Recruiters will begin the remainder of the Talent Acquisition process. • What HRBPs should look for: Ensure that managers have selected the appropriate fields.
3. Change Job HRBP's are Approvers	<ul style="list-style-type: none"> • What is it? A job change is performed in Workday as a result of a transfer, a promotion, a lateral move, a demotion, or a data change (such as change in location). When an employee changes jobs due to applying for and being offered a new job in ICIMS, the process occurs automatically. For any job changes outside of ICIMS, an employee's manager will initiate the change in Workday. • What HRBPs should look for: Ensure the data fields are correct and review that your manager has selected the appropriate fields for the new organization.
4. Terminations HRBP's are Approvers and can Initiate, if needed	<ul style="list-style-type: none"> • What is it? Workday is the system of record for both voluntary and involuntary terminations. Employees can initiate a voluntary resignation after discussing it with their manager. Managers, HRBPs, or myself (if needed) can initiate an involuntary separation in Workday. Terminations trigger system shutdowns. • What HRBPs should look for: Ensure the correct termination reason was selected by the manager, as termination reasons impact downstream systems. Eligibility for retire should be reviewed to ensure appropriate selection by manager.

CONTACT US!



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