Leading Your Organization Through the

Shared Services Journey and Avoiding Pitfalls

Agenda

Your Discussion Leads

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Who We Are

CORPORATE & SHARED SERVICES

ScottMadden is a management consulting firm with more than **40 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.

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

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 thousands of 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 assessment, strategy, design, implementation, technology, business case and roadmap, governance, program management, and change management.

Smart. Focused. Done Right.®

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Experience in Shared Services

ASSESS & 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
- Organizational design
- Technology evaluation
- Implementation planning
- Change management
- Governance

BUILD

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

IMPROVE

- Analytics setup and deployment
- Operations improvement
- Service expansion
- Cost reduction
- Process optimization
- Technology upgrade
- Resource development
- Customer satisfaction measurement

Our deep understanding of building and improving shared services models enables us to provide realistic, implementable solutions that are tailored to best-fit the organization.

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Experience in Multi-Function Shared Services

We have significant shared services experience across multiple functions (list not all-inclusive).

FINANCE & ACCOUNTING

- Accounts Payable
- General Ledger
- Fixed Assets
- Accounts Receivable
- Purchasing
- Tax Compliance
- Cash Management
- Travel and Entertainment

HUMAN RESOURCES

- Payroll Processing
- Compensation/Benefits Admin
- Recruiting/Staffing
- Training and Development
- Relocation
- HRIS and Reporting
- Leaves Administration
- Global Mobility Support

RESEARCH (Contracts/Grants)

- Pre-Award
- Post-Award Policies/Procedures
- Sub-Award
- Research Corp Sub-Award
- Sub-Recipient Billing/Invoicing
- Sponsor Billing/Invoicing

INFORMATION TECHNOLOGY

- Service Desk
- Technology Acquisition
- Technology Architecture
- Application Maintenance/Operations
- Network Operations Center
- Systems Administration
- Security Operations

ADDITIONAL COMMON CAMPUS SERVICES

- Facilities
- Legal
- Audit and Risk Management
- Regulatory Affairs
- Environmental Health, Sustainability, and Safety
- Student Services and Alumni Relations
- Security and Police
- Parking Permitting and Administration
- Marketing, Brand Compliance, and Media Relations
- Regional Performing Arts Booking
- Printing Services
- etc.

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Representative Clients

Representative sample of our cross-industry clients along with a deep dive into some of our higher-education clients (not all-inclusive)

Shared Services Overview

Why is Change Challenging in Higher Ed?

Universities have complex organizations, diverse objectives and stakeholder groups, and proud, long-standing cultures. We are adept at working with university leadership, deans, faculty, staff, and students.

Financial Constraints

Funding is dwindling; universities faced with cutting administrative costs, while maintaining high service standards

Changing Expectations

Leadership, faculty, staff, and students have diverse needs and evolving expectations in the modern service environment

Long-Standing Cultures

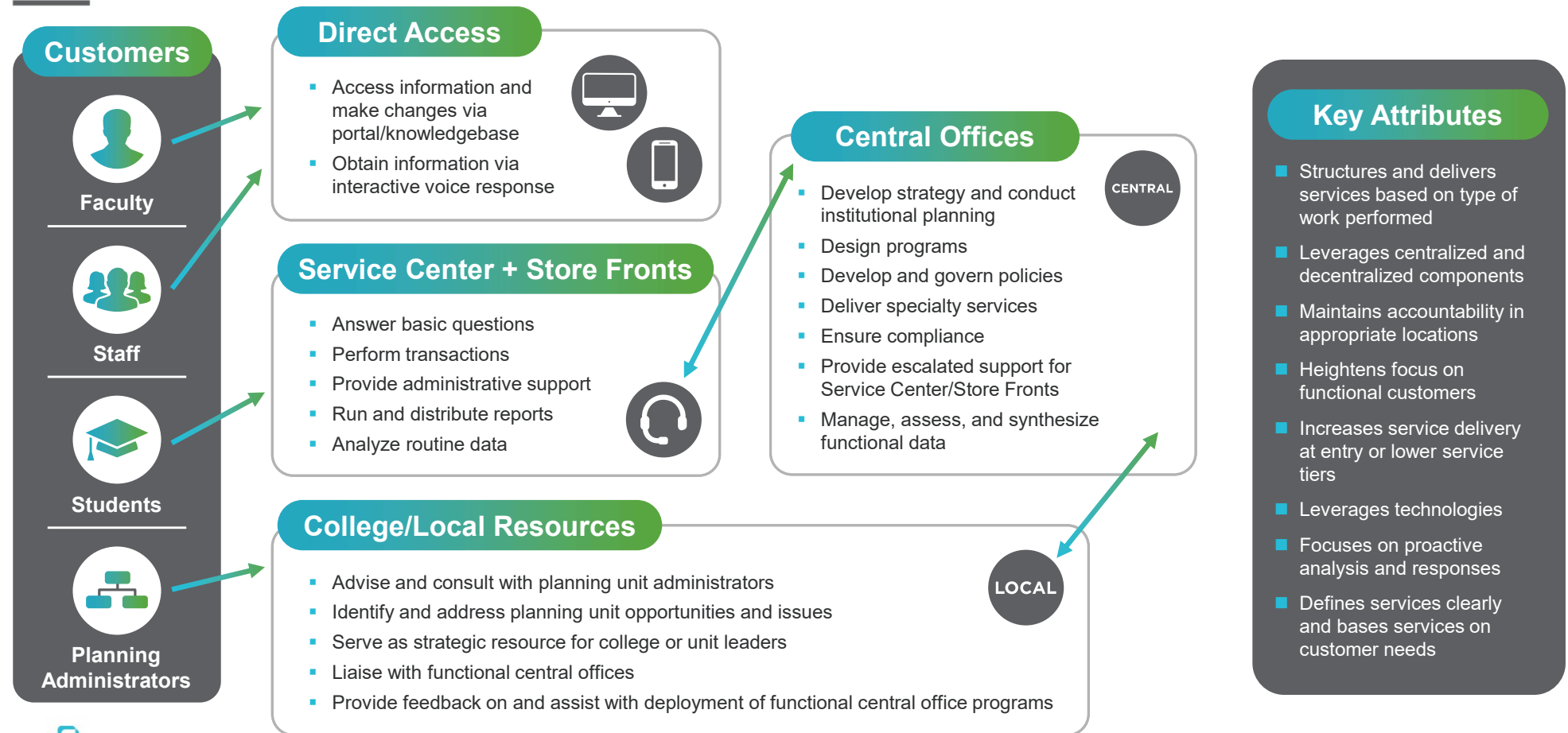Traditions and long-tenured faculty can make change seem even more difficult

Complex Governance

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

ScottMadden has been working with higher-education clients in the public, private, domestic, and international environments across our array of services for more than 20 years.

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Leading Practice Shared Services Model

Customers

Faculty

Staff

Students

Planning Administrators

Direct Access

- Access information and make changes via portal/knowledgebase
- Obtain information via interactive voice response

Service Center + Store Fronts

- Answer basic questions
- Perform transactions
- Provide administrative support
- Run and distribute reports
- Analyze routine data

College/Local Resources

- Advise and consult with planning unit administrators
- Identify and address planning unit opportunities and issues
- Serve as strategic resource for college or unit leaders
- Liaise with functional central offices
- Provide feedback on and assist with deployment of functional central office programs

LOCAL

Central Offices

CENTRAL

- Develop strategy and conduct institutional planning
- Design programs
- Develop and govern policies
- Deliver specialty services
- Ensure compliance
- Provide escalated support for Service Center/Store Fronts
- Manage, assess, and synthesize functional data

Key Attributes

- Structures and delivers services based on type of work performed
- Leverages centralized and decentralized components
- Maintains accountability in appropriate locations
- Heightens focus on functional customers
- Increases service delivery at entry or lower service tiers
- Leverages technologies
- Focuses on proactive analysis and responses
- Defines services clearly and bases services on customer needs

Benefits of a Shared Services Model

Improve Service Delivery and Transparency

- Better customer experience
- Standard processes
- Common model for expansion
- Performance metrics

Cost Control and Scalability

- Skillset and work alignment
- Economies of scale
- Automation of process
- Elimination of redundant work

Gain Control & Leverage Data

- Improve reporting and analytics
- Improve compliance
- Better decision making

End-to-End Accountability

- Less rework caused by upstream process issues
- Improved end-to-end process coordination
- Focus on root cause problem resolution

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Benefits of Shared Services – HR Benchmark Examples

Top-performing service centers operate more efficiently and provide a better customer experience.

Customer Experience in HR

90%

First-Contact Resolution

20 **secs**

Average Speed To Answer

8%

Service Center Employee Turnover

Shared Services Overview

Typical Implementation Work Streams

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.

TYPICAL IMPLEMENTATION WORK STREAMS

| Policy Standardization and Process Redesign | Organization and Staffing | Communication, Change Management, and Training | Technology | Facilities | Service Management and Metrics |

Program/Project Management

Form and manage teams | Provide tools and templates | Manage resources and progress | Identify and resolve issues

Work streams are distinct but closely integrated. Activities become iterative as work streams progress.

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Typical Timeline

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Live Poll!

What functions have you implemented in shared services (e.g., HR, Finance, Research, etc.)?

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Live Poll!

What functions are you considering implementing in the future?

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Opportunities Exist, Regardless of Your Maturity

Maturity Curve

Start-Up

Growth

Mature

Start-Up	Growth	Mature
▪ Policy harmonization	▪ Process redesign	▪ Continuous improvement
▪ Process redesign	▪ Expansion opportunities	▪ Expansion opportunities
▪ Service delivery model review	▪ Leverage of leading practices and benchmarks	▪ Customer satisfaction
▪ Organizational structure	▪ Training and staff retention	▪ Leverage of leading practices and benchmarks
▪ Technology implementation	▪ Other technology investments	▪ Career pathing
▪ Governance model	▪ Multifunction integration	▪ Technology optimization
	▪ Governance clarification	▪ Multifunction optimization

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Building a Long-Term Strategy for Success

Leading Practice Framework for Optimizing Shared Services

University Leadership

Shared Services Leadership

People and Organization
- Organizational Structure
- Work Activities
- Roles and Responsibilities
- Training and Development

Policy and Process
- Policies
- Functional and Operational Processes
- Infrastructure
- Procedures
- Tools and Job Aids

Services

Data and Knowledge
- Metrics
- Reporting
- Knowledge Content
- Training

Tools and Technology
- ERP Systems
- Intelligent Automation
- Vendor
- Applications
- Self-Service
- Workflow
- Analytics

Deans, Faculty, Staff
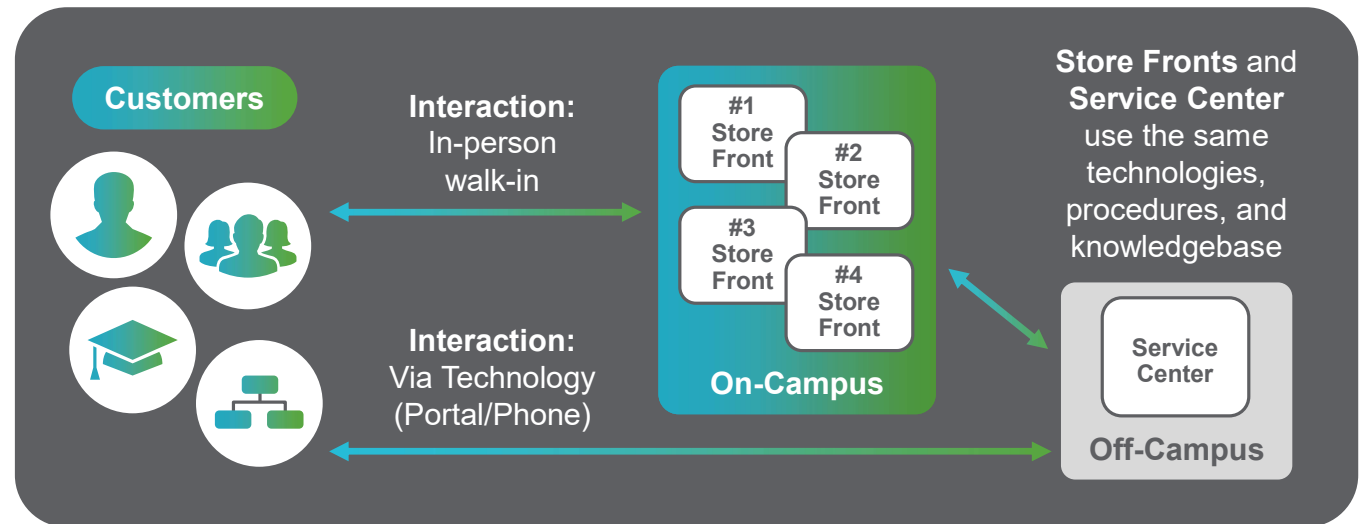
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What Good Looks Like – Leading Practices Model

A progressive model includes the concept of "hubs or store fronts" combined with a <u>single</u> multi-function service center.

Benefits

- In-person contact

- Research "office hours" for faculty

- Direct access via technology for inquiries

- Simpler governance/ process consistency

Long-term strategy includes closing store fronts as customers become accustomed to using self-service and interacting with the service center remotely.

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Building a Long-Term Strategy for Success

Optimizing Strategic Business Advisors Is Critical to the Model
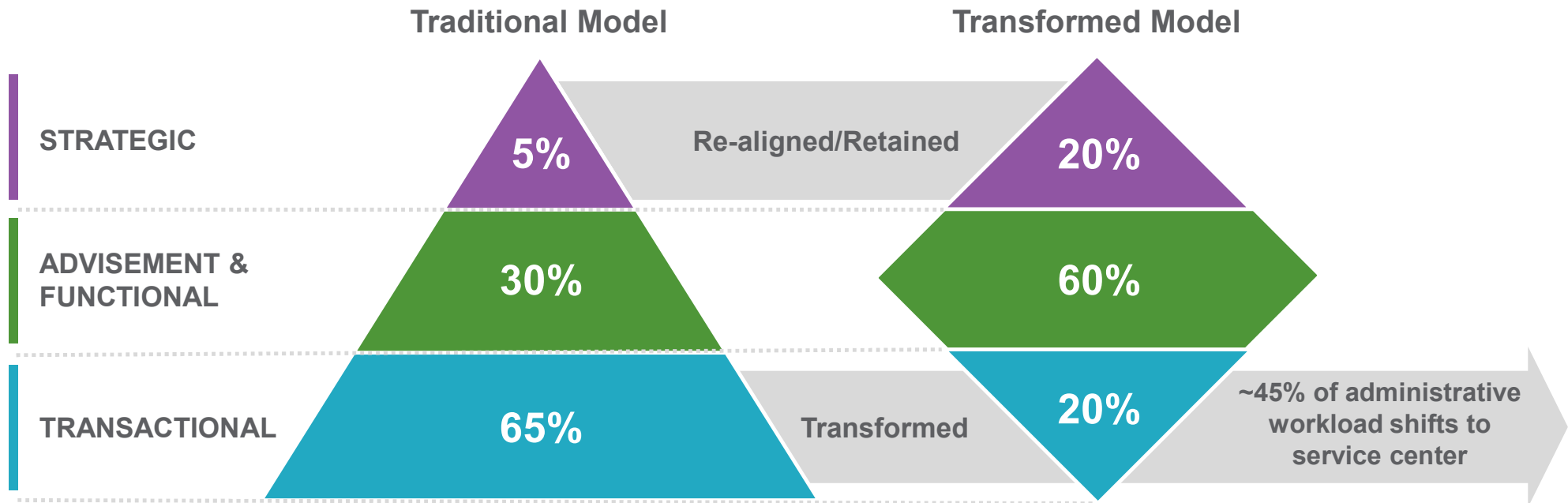
Strategic Business Advisors (SBAs) remain focused on business strategies

| Manage Talent | Manage Budgets | Drive Performance | Optimize Local Knowledge |

Traditional Model

Transformed Model

STRATEGIC — 5% | Re-aligned/Retained | 20%

ADVISEMENT & FUNCTIONAL — 30% | 60%

TRANSACTIONAL — 65% | Transformed | 20% | ~45% of administrative workload shifts to service center

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Set Scope and Clarify Responsibilities

Setting the scope of work for each service delivery channel serves as the blueprint for all transformation activities.

The scope should:

- Demonstrate who is responsible for what work

- Align with the overall transformation road map

- Depict how work will shift from the current to the future service delivery model

- Include work owned by third-party providers (e.g., Benefits)

- Validate functionality of planned technologies

- Be socialized with key leaders and constituencies

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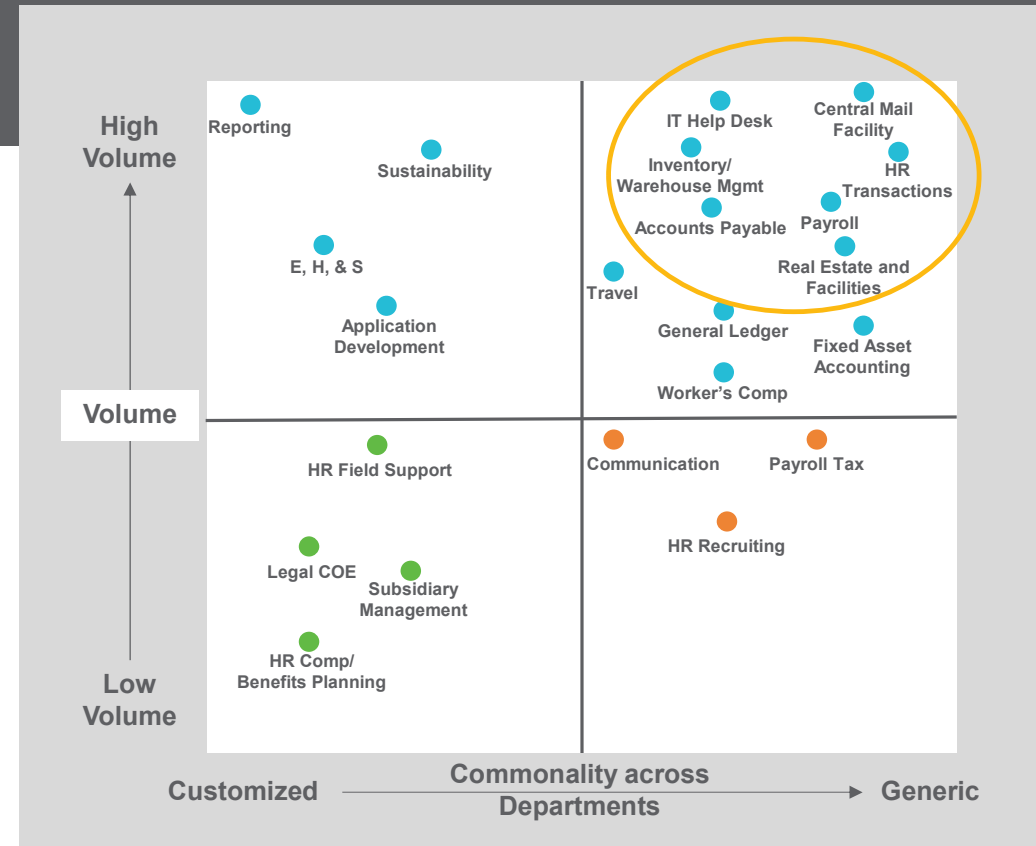
Enhance the Employee Experience

Upward career potential, monetary incentives, and additional training opportunities are reported as top drivers for retaining staff among survey respondents.

An Effective Leader:

- Provides a clear, concise, and overt statement on rewards

- Is helpful in markets where talent is difficult to attract

- Differentiates a company as an employer of choice and provides candidates a clear view

What is the biggest driver for RETAINING staff in your organization?

Recognition programs, 6%

Other, 4%

Additional training opportunities, 24%

Monetary incentives, 26%

Upward career potential, 40%

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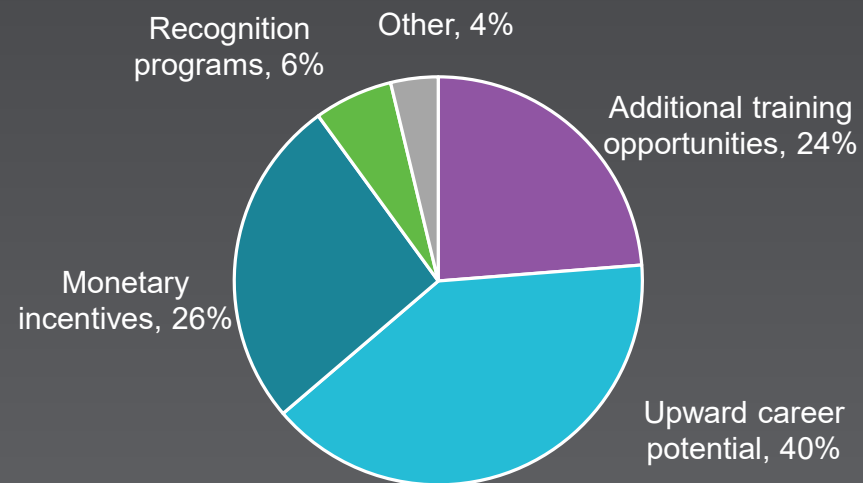
Live Poll!

> **What have been the most effective engagement strategies at your organization?**

Recognition	Engagement with senior leadership	Ongoing (weekly) stakeholder huddles	Honest communication
Flexible working from home	Campus in person visits	Regular check ins with senior leaders	Collaboration with multi disciplinary team
	Training and development	Executive leadership support	Inclusion in decisions making
	Host luncheons with service providers and units to ease	SWOT/SOAR	Retrospectives

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"But We Are Unique!"

Determine policy exceptions and create guidelines for exceptions:

- Establish policy review committee, including policy owners and key stakeholders (Admin units, legal, college representatives)
- Determine which policies will be harmonized and therefore will not allow exceptions by unit
- Determine what deviations will be allowed and under what circumstances, as well as guidelines that put boundaries around the exceptions

For each policy exception, document specific criteria answering:

- Who is eligible for an exception?
- Under what circumstances can an exception be granted?
- What types of exceptions are allowed?
- Who must approve an exception?
- How will the exception be communicated and documented?

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Develop Processes

| Workshops Redesign | Stakeholder Review and Finalization | Templates and Tools Development | Process Owner Assignment | Continuous Improvement |

Document redesigned processes using leading practice principles. Ensure that:

- There are **single, enterprise-wide processes**

- **Intake mechanisms** for processes are clearly defined

- **Roles and responsibilities** are clearly defined

- **Service level agreements (SLAs) and cycle times** for process steps are captured

- **Variation** among processes is **minimized**

- **Technology is leveraged** where possible to reduce manual intervention

- **Customer experience** is considered throughout the process

Building a Long-Term Strategy for Success

Ingrain Continuous Improvement

Continuous improvement uses performance measures to drive organizational strategy.

PROGRAM CHARACTERISTICS

A university-wide management system

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

An ongoing process:

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

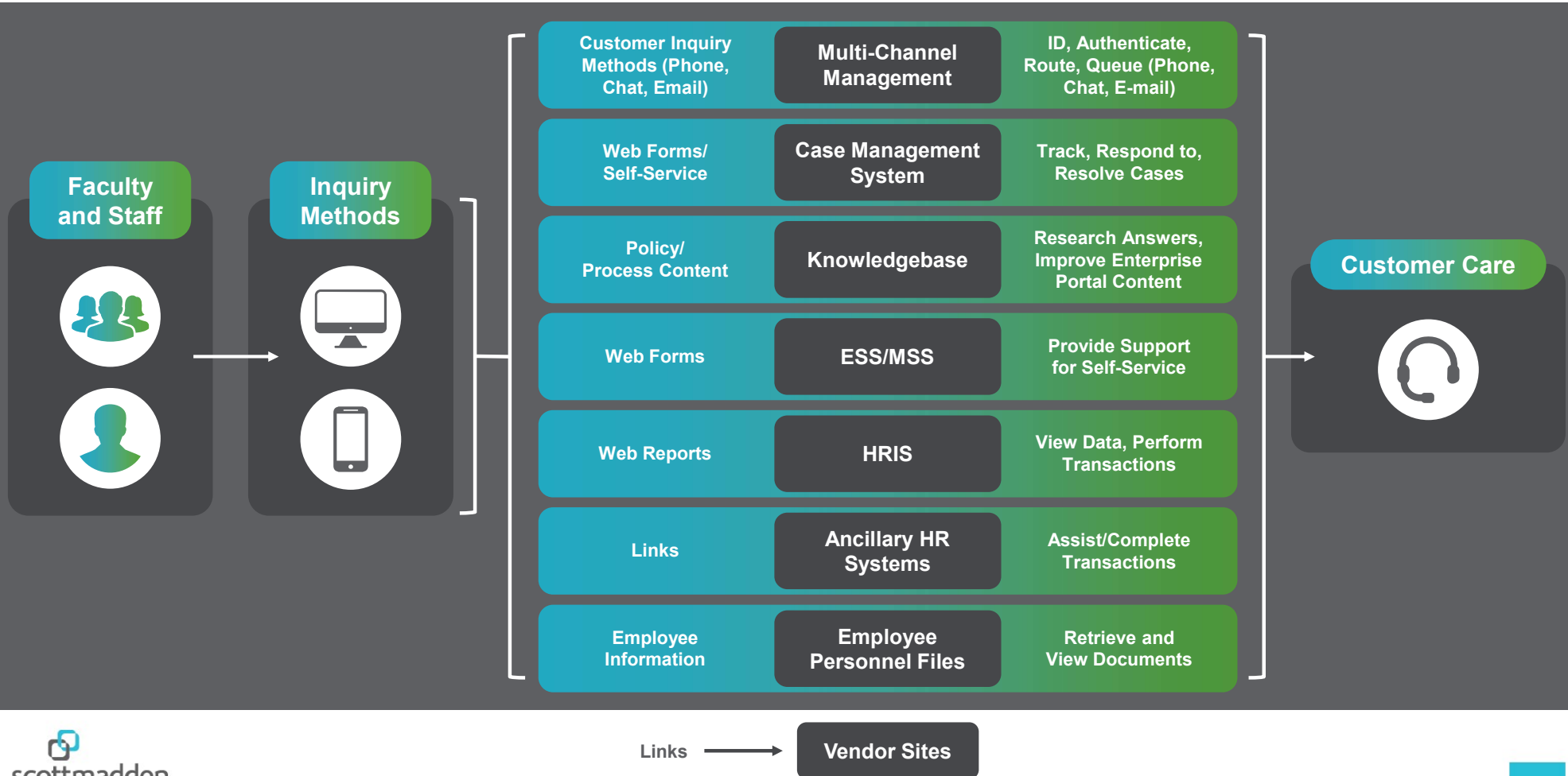**Set Measures and Targets**

Reward and Coach   Plan and Execute

Monitor and Evaluate

What Good Looks Like: Critical Elements

Faculty and Staff

Inquiry Methods

Customer Inquiry Methods (Phone, Chat, Email)	**Multi-Channel Management**	ID, Authenticate, Route, Queue (Phone, Chat, E-mail)
Web Forms/ Self-Service	**Case Management System**	Track, Respond to, Resolve Cases
Policy/ Process Content	**Knowledgebase**	Research Answers, Improve Enterprise Portal Content
Web Forms	**ESS/MSS**	Provide Support for Self-Service
Web Reports	**HRIS**	View Data, Perform Transactions
Links	**Ancillary HR Systems**	Assist/Complete Transactions
Employee Information	**Employee Personnel Files**	Retrieve and View Documents

Customer Care

Links ⟶ **Vendor Sites**

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Building a Long-Term Strategy for Success

Consider the Impacts of "Disruptive Technology"

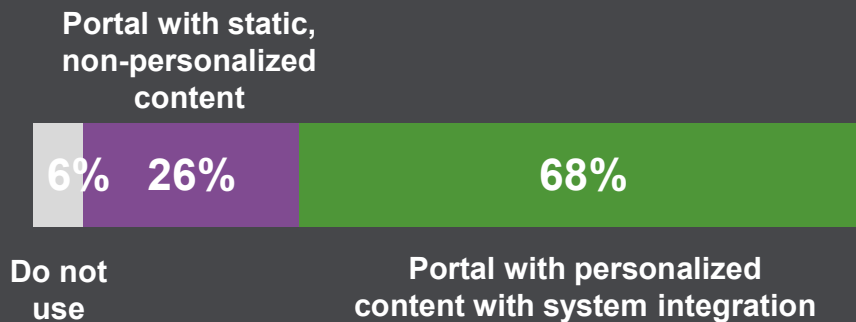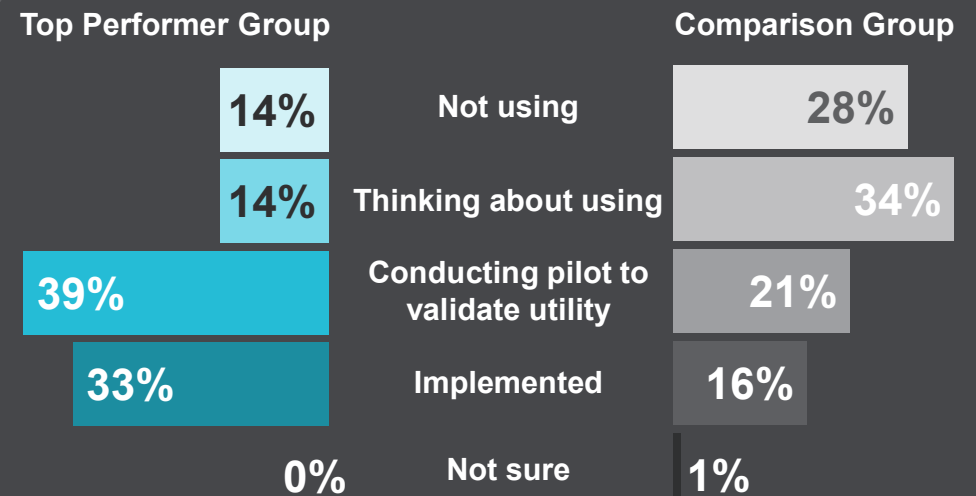|	**2015**	**2016-2018**	**2019**	**2023**
CATEGORY →	**Robotic Process Automation (RPA)**	**Virtual Agents and Chatbots**	**Conditional Artificial Intelligence (AI)**	**Generative Artificial Intelligence (AI)**
Characteristics of Data Input	Structured, rule driven, and static	Structured data with cognitive computing	Largely structured data with hidden patterns	Unstructured/structured data, driven by prompts
Nature of Ideal Process Fit	• Digital repetitive steps • Rule-based/logic driven • Time consuming • Documented • Static rules	• Customer-interfacing • Global support requires training data in multiple languages • Basic Q&A	• Problem areas are pre-identified • Non-routine inquiries • Access to expansive sets of data • Answers are identifiable by patterns	• Generates content with open data searches • Can point to an organization's secure data • Human-like responses • Complex Q&A
Process Candidate Examples	• AP/AR management • Billing and invoices • Data entry/management	• Customer service • Vendor inquiries • Delivery/scheduling	• Document research (contracts) • Forecasting (turnover) • Problem solving patterns	• Content generation • Forecast • Customer Service • Optimization

Data structure and integrity is essential across all Intelligent Automation.

What Good Looks Like: Portal Use and Automation

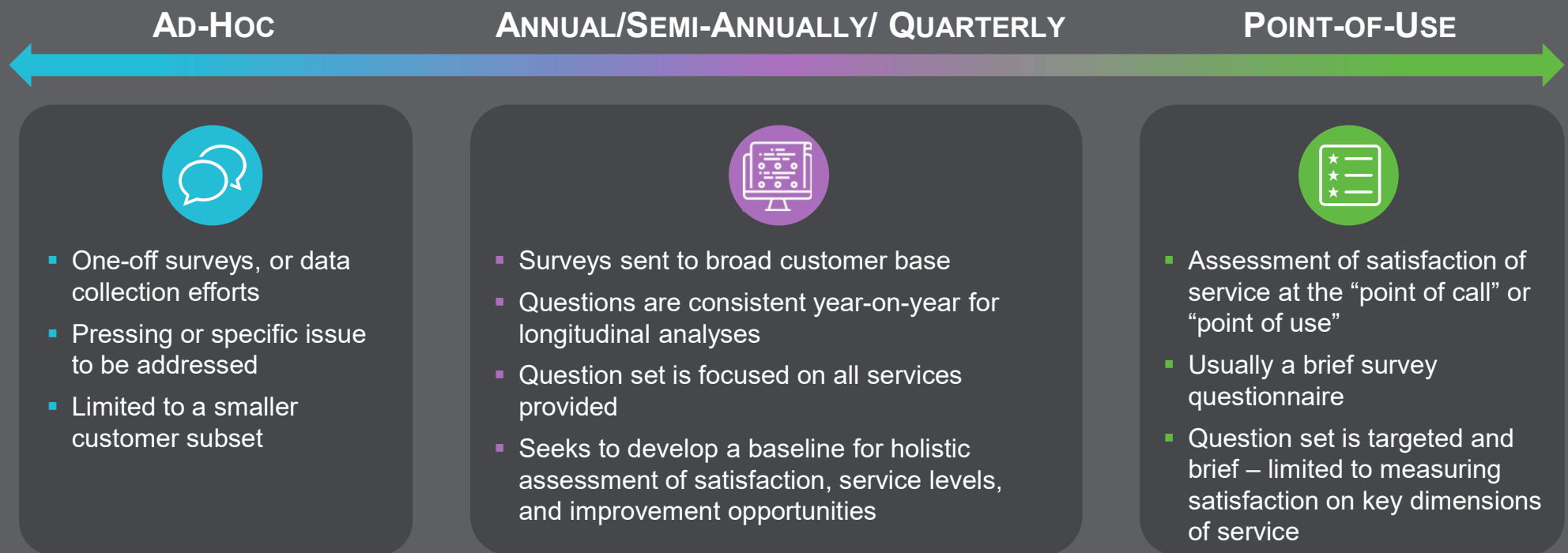## Which best describes your organization's use of an employee portal?

Portal with static, non-personalized content

6% | 26% | 68%

Do not use

Portal with personalized content with system integration

What extent is shared services organization using intelligent automation opportunities?

Top Performer Group		Comparison Group
14%	Not using	28%
14%	Thinking about using	34%
39%	Conducting pilot to validate utility	21%
33%	Implemented	16%
0%	Not sure	1%

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Building a Long-Term Strategy for Success

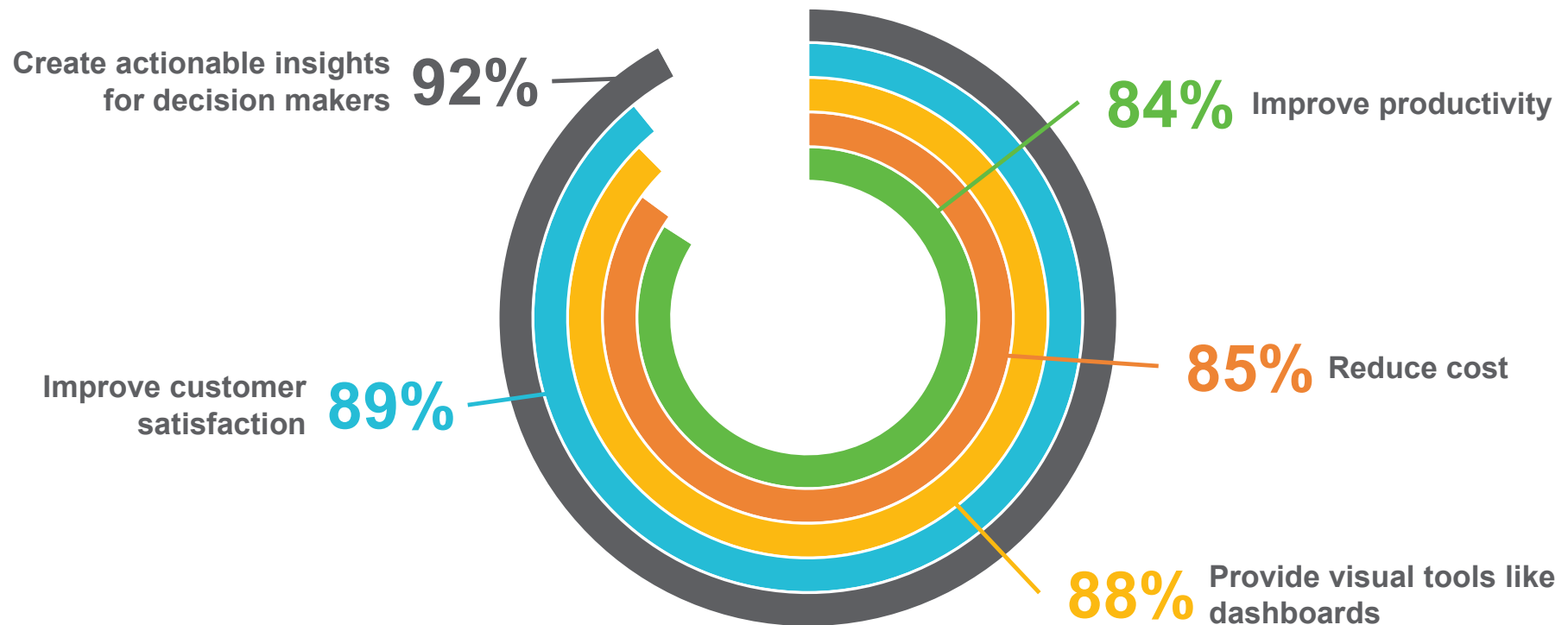# Leverage Multiple Methods of Measurement

Shared services can benefit from a more holistic picture of performance and satisfaction.

AD-HOC	ANNUAL/SEMI-ANNUALLY/ QUARTERLY	POINT-OF-USE

- One-off surveys, or data collection efforts
- Pressing or specific issue to be addressed
- Limited to a smaller customer subset

- Surveys sent to broad customer base
- Questions are consistent year-on-year for longitudinal analyses
- Question set is focused on all services provided
- Seeks to develop a baseline for holistic assessment of satisfaction, service levels, and improvement opportunities

- Assessment of satisfaction of service at the "point of call" or "point of use"
- Usually a brief survey questionnaire
- Question set is targeted and brief – limited to measuring satisfaction on key dimensions of service

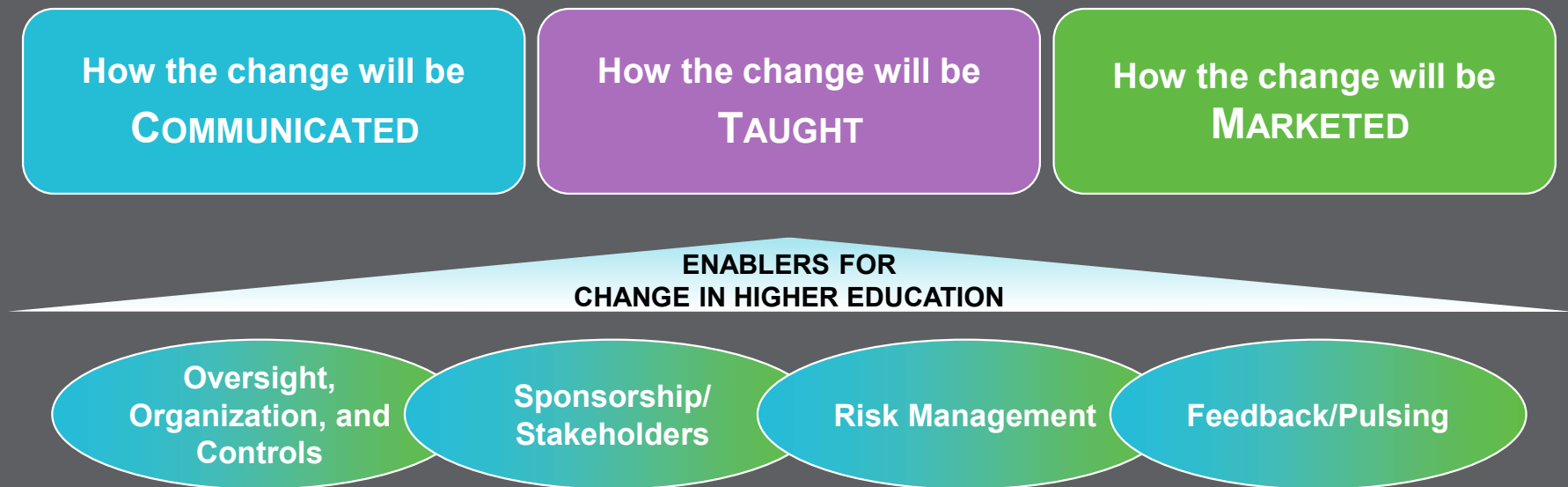Building a Long-Term Strategy for Success

Supporting Organizational Goals and Activities

Analytics is predominantly used as a tool for decision-makers to create actionable insights. Below are the top five roles' analytics plays in an organization.

Create actionable insights for decision makers **92%**

84% **Improve productivity**

85% **Reduce cost**

Improve customer satisfaction **89%**

88% **Provide visual tools like dashboards**

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Building a Long-Term Strategy for Success

Managing the Change

One of the most critical elements to long-term success is managing through change. Any change, big or small, should consider:

How the change will be **COMMUNICATED**	How the change will be **TAUGHT**	How the change will be **MARKETED**

ENABLERS FOR CHANGE IN HIGHER EDUCATION

Oversight, Organization, and Controls	Sponsorship/ Stakeholders	Risk Management	Feedback/Pulsing

Building a Long-Term Strategy for Success

…And Don't Forget About Governance!

Decision making can be complex. It typically takes time; must be factored into the project plan; and includes various stakeholders, including central administration, deans, and key faculty members.

Example Governance Structure

EXECUTIVE SPONSOR (e.g., Chancellor)
- Set strategy and provide guidance, direction, and advocacy
- Set rules of engagement
- Understand status and risk(s)
- Resolve disputes
- *Who: Senior leader*

PROJECT LEADS
- Lead project and internal project team on daily task execution
- Ensure integration; solve problems
- Monitor and evaluate progress; report status
- *Who: Typically, one (1) lead from university system, one (1) lead from ScottMadden*
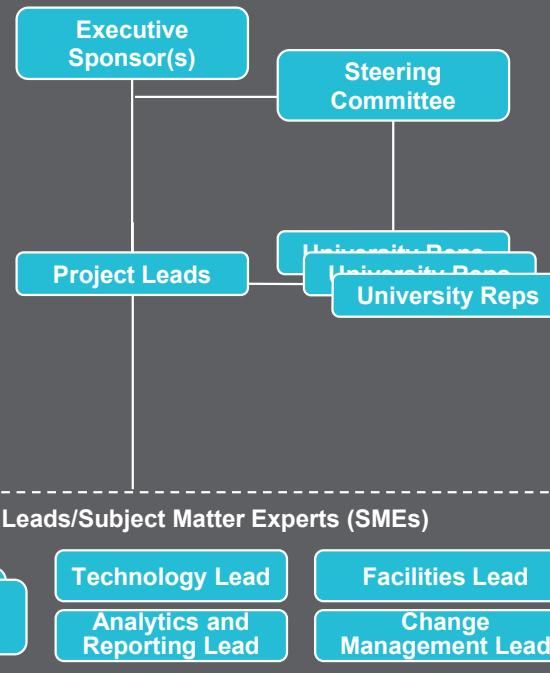
STEERING COMMITTEE (e.g., Campus Presidents)
- Identify opportunities and appropriate linkages
- Resolve issues or concerns
- Advise and escalate, as needed
- *Who: Campus Presidents, system administration, select stakeholder(s)*

UNIVERSITY CAMPUS REPS
- Facilitate access to information
- Provide feedback and insights on recommendations
- Raise risks and mitigations, as identified

SMEs
- Act as part-time project participants
- Provide expert advice, services, and consultation on specific subjects
- Provide input on proposed designs
- *Who: Part-time participants from universities and existing shared services organization*

Diagram boxes:
- Executive Sponsor(s)
- Steering Committee
- Project Leads
- University Reps
- **Functional Leads/Subject Matter Experts (SMEs)**
  - University-Specific Functional SMEs (by in-scope functional area)
  - Technology Lead
  - Facilities Lead
  - Analytics and Reporting Lead
  - Change Management Lead

Revamping Traditional Models

Revamping Traditional Models and Services Provided

Many shared services organizations began with one function or a couple siloed functions. As shared services organizations mature, below are a few more advanced concepts to consider:
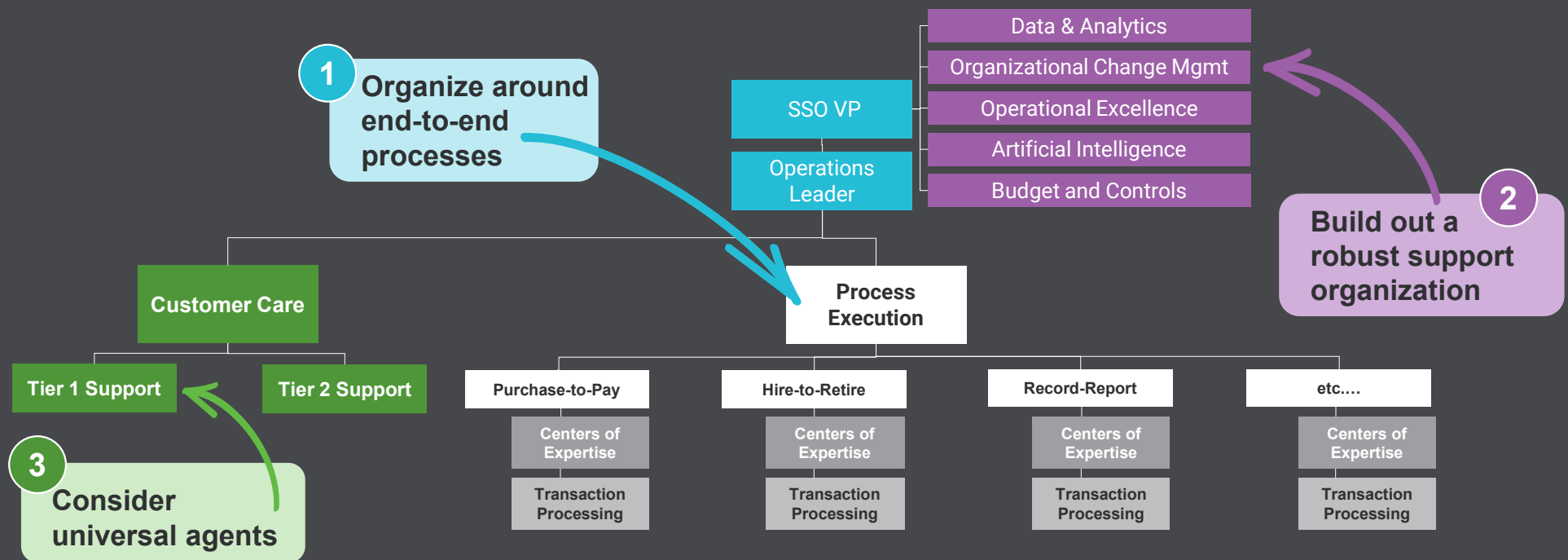
Revamping Traditional Models and Services Provided (Cont'd)

1 **Organize around end-to-end processes:** Organizing around end-to-end processes enhances customer focus, improves operational efficiency, promotes accountability, ensures quality and consistency, and drives cost optimization.

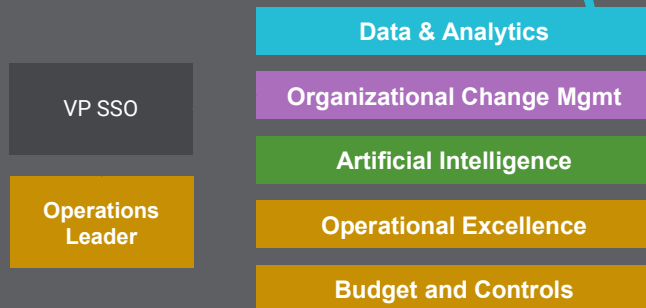| Holistic View	Efficiency and Effectiveness	Quality and Consistency	Customer Focus
This approach promotes better understanding of the entire service lifecycle and better enables cross-functional teams to identify opportunities for optimization and improvement	Streamlines workflows, reduces handoffs and bottlenecks, and enhances overall efficiency and effectiveness	Enables better management of quality standards and ensures consistency in service delivery across end-to-end process touchpoints	Aligns more closely with customer needs and expectations, emphasizing effective delivery of seamless, integrated services

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Revamping Traditional Models and Services Provided (Cont'd)

2 **Build out a robust support organization:** Some organizations are elevating critical support functions to a CoE level with a direct reporting relationship into the VP of SSO.

A **layered and centralized approach** to data strategy, storage, and reporting can support different end users, accelerate business intelligence, and centralize and standardize data governance and advanced analytics

VP SSO

Operations Leader

Data & Analytics

Organizational Change Mgmt

Artificial Intelligence

Operational Excellence

Budget and Controls

Organizational Change Management

Training
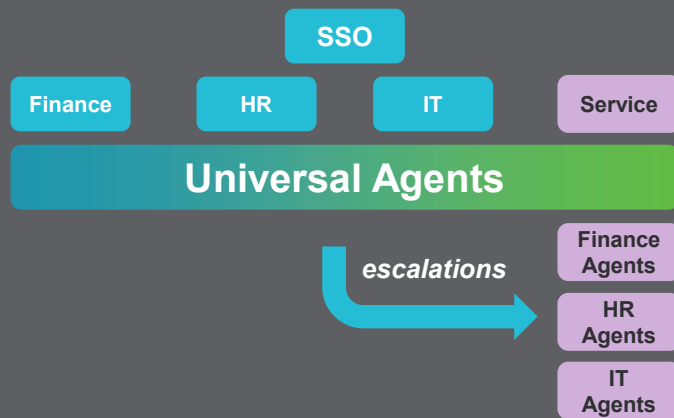
Communications

OCM Program Manager

Marketing/Branding

Flex Resources

A consolidated change enablement CoE structure **drives seamless integration of flexible project-based change management practitioners** aligned within the strategic direction of a broader CoE to ensure comprehensive organizational change enablement

Devoting resources to latest technologies to continuously improve

Revamping Traditional Models and Services Provided (Cont'd)

3 **Consider Universal Agents:** A universal agent is a first line of defense, responding to inquiries across all functions served in a multifunction service delivery model. On the surface, this role is practical but does is not widely adopted.

SSO

Finance | HR | IT | Service

Universal Agents

escalations → Finance Agents
HR Agents
IT Agents

"In theory, super agents are ideal. They are dynamic, well-trained, and can handle a wide variety of customer issues. In practice, it's hard to master."

-Andrew Nocera – Sr. Training Manager, Amazon
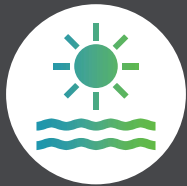
Benefits
- Increased efficiency
- Better customer experience
- Improved first-contact resolution

Challenges
- Harder to find and higher cost
- Work becomes challenging as SSO grows
- More dependent on tools

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Competency Building

Competency Building

Six Reasons to Focus on Competencies and Skillsets

As traditional models evolve and expand, organizations should evaluate their leadership and employee competencies to ensure talent requirements remain aligned.

1. Enable Performance Management
Ensure you have the right set of competencies and then measure against them for a comprehensive view of organizational capabilities.

2. Identify Strengths and Gaps
Identify strengths and weaknesses in teams and individuals.

3. Align Skills with Roles
Match employees to roles and responsibilities that align with their strengths and expertise to increase performance and job satisfaction.

4. Inform Training and Development
Determine the specific skills and knowledge areas where employees may benefit from additional training, coaching, or skill-building programs.

5. Facilitate Succession Planning
Identify high-potential individuals, develop talent pipelines, and prepare for future leadership and skill needs.

6. Drive Continuous Improvement
Address gaps by investing in skill development to enhance performance, efficiency, and overall effectiveness.

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Competency Building

HR Business Partner Competencies and Skills

A recent higher education client realized HR Business Partner (HRBP) knowledge and skills varied across colleges and business units. With hopes of **evaluating and eventually upskilling**, ScottMadden issued a survey to all HRBPs to measure the organization's level of proficiency in key HR competencies.

Nine Society for Human Resource Management (SHRM) Competencies Evaluated:

Business Skills
- Business Acumen
- Critical Evaluation
- Consultation

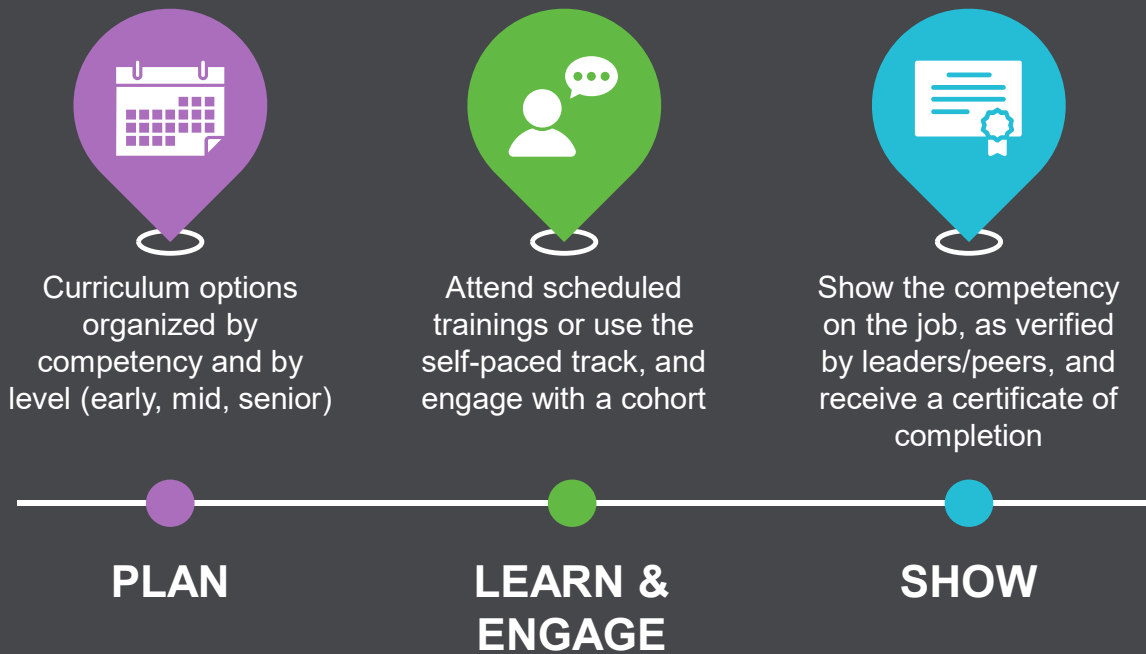### Interpersonal Skills
- Communication
- DE&I
- Relationship Mgmt

Leadership Skills
- Leadership Navigation
- Ethical Practice

Technical Skills
- HR Expertise, which can be modified for non-HRBPs

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Competency Building

Building a Program to Address Skill Gaps

PLAN
Curriculum options organized by competency and by level (early, mid, senior)

LEARN & ENGAGE
Attend scheduled trainings or use the self-paced track, and engage with a cohort

SHOW
Show the competency on the job, as verified by leaders/peers, and receive a certificate of completion

This program will help to ensure that leadership at at the university can **expect a consistent, top-quality level of service and knowledge** from all HRBPs, regardless of whether they have the same organizational reporting lines.

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Common Pitfalls and Mitigations

Common Pitfalls and Mitigations

Our Experience Enables us to Plan for and Navigate Common Challenges

COMMON CHALLENGES

| Resistance | Silo Mentality | Lack of Standardization | Internal Focus |
| Lack of Accountability | Limited Innovation and Stagnation | Poor Organization or Skill Alignment | Limited Current State |

MITIGATION TACTICS

- Strong, sustained leadership and sponsorship
- Executive sanctioning of the new process
- Stretch goals and aggressive timing
- Effective measurement and rewards
- Leveraging leading practices

- Customer participation
- Work-focused; not functional teams
- Removing current state service delivery pathways (not aligned with future state) at the first opportunity
- Cascaded, frequent communication

- Willingness to spend time and effort in evaluation of current operations
- Visits to successful operations
- Detailed current state assessments and future state design

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Wrapping Up

HOUSEKEEPING ITEMS

- Complete SSON's workshop evaluation form to help us improve
- Request access to our complete workshop presentation

HEAR FROM ONE OF OUR CLIENTS

Presentation Topic: User Centric Design – Keeping your Customer Front-of-Mind throughout Technology Changes

- Speaker: Kellye Terrell, Georgia Institute of Technology
- Thursday, September 19th at 11:40-12:10

STOP BY SCOTTMADDEN'S BOOTH

- Participate in our demo drive
- Drop a card to gain access to shared services insights and helpful resources
- Enter our booth drawing for a chance to win a Solo Stove!

Thank you for participating in today's workshop and enjoy the rest of the conference!

Why ScottMadden?

Our success is the direct result of our people. Our work is guided by these values:

✓ We will **exceed our clients' expectations**, we will do what we say we will do, and we will do it extraordinarily well.

✓ We will be **accountable to our clients and each other** and operate in a manner that conveys a **genuine focus on service** founded on **mutual respect and trust.**

✓ We will place the **long-term good of our clients** above our own interest and conduct our business **ethically with humility, empathy and fairness.**

✓ We will maintain a **challenging, diverse, and inclusive work environment** centered on client success while **promoting collegiality, creativity, and responsibility.**

scottmadden
MANAGEMENT CONSULTANTS

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