



Shared Services 501: Unlocking the Next Phase of Shared Services Maturity

Shared Services and Outsourcing Week

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SCOTTMADDEN



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PROCESS



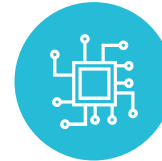
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Introduction



**ScottMadden
Overview**



**Key Themes
for Organizational
Excellence**

Who We Are

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.



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 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 help our clients with assessment, strategy, design, implementation, technology, business case and roadmap, governance, program management, and change management.

Smart. Focused. Done Right.®

Areas of Focus



FINANCE AND ACCOUNTING

We help companies **transform their finance and accounting operations**. Through enterprise financial business services, strategic centers of expertise, intelligent automation solutions, hybrid insource/outsource delivery models, and other solutions, we help you increase value for your company.



MULTIFUNCTION/GBS

We move **shared services to the next generation**—integrating finance, human resources, information technology, supply chain, and/or other business services into a single, multifunction shared services or global business services operation that leverages intelligent automation and has effective governance and management.



HUMAN CAPITAL MANAGEMENT

We offer **HR transformation** (including HR shared services), IA solutions, analytics, HR systems (selection, implementation, and optimization), process design and continuous improvement, talent and employee engagement strategy and programs, and payroll—the services your organization needs to excel.



SUPPLY CHAIN

We assist clients across the full range of supply chain processes and have the unique ability to **create alignment between supply chain and its stakeholders**. From crafting new supply chain strategies to restructuring your organization to improving your daily operations, including intelligent automation, we help you with every step.



INFORMATION TECHNOLOGY

From IT assessments and strategic direction to governance, cybersecurity, and risk and compliance management, we can help your organization **get the most out of its IT investment**. We also help you **optimize your projects** to focus on delivering business outcomes not just installed technology.



BUSINESS SUPPORT SERVICES

We help our clients **improve service response to the business**, including through the **integration of various administrative services** into their shared services model. Services often include real estate, facility maintenance, fleet, security, sales and marketing, insurance, customer service, research, and others.

Corporate and Shared Services Capabilities



Assess and Plan

- Strategic alignment and planning
- Operating model alignment
- Feasibility analysis
- Benchmarking
- Statistical and analytical modeling
- Leading practices 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
- Policy assessment
- Intelligent automation strategy
- Sourcing evaluation
- Organizational design
- Technology evaluation
- Transformation planning
- Implementation planning
- Change management



Build

- Project management
- Service and transaction center build
- Detailed organizational design
- Staffing
- Policy harmonization
- Process redesign
- Intelligent automation build
- Technology design, selection, implementation, and support
- Education and training
- Facility design and setup
- Change management
- Sourcing implementation
- Metrics and dashboarding



Improve

- Analytics setup and deployment
- Operating model improvement
- Governance
- Service expansion
- Cost reduction
- Process redesign
- Intelligent automation implementation
- System enablement
- Enterprise program development
- Merger and acquisition integration
- Field resource development
- Voice-of-the-customer surveys
- Metrics and performance management

Representative Clients

Retail and Consumer Products	Manufacturing and Industrial	Technology and Communications	Higher Ed., Public Sector, Non-profit	Energy and Utilities	Healthcare	Professional Services

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

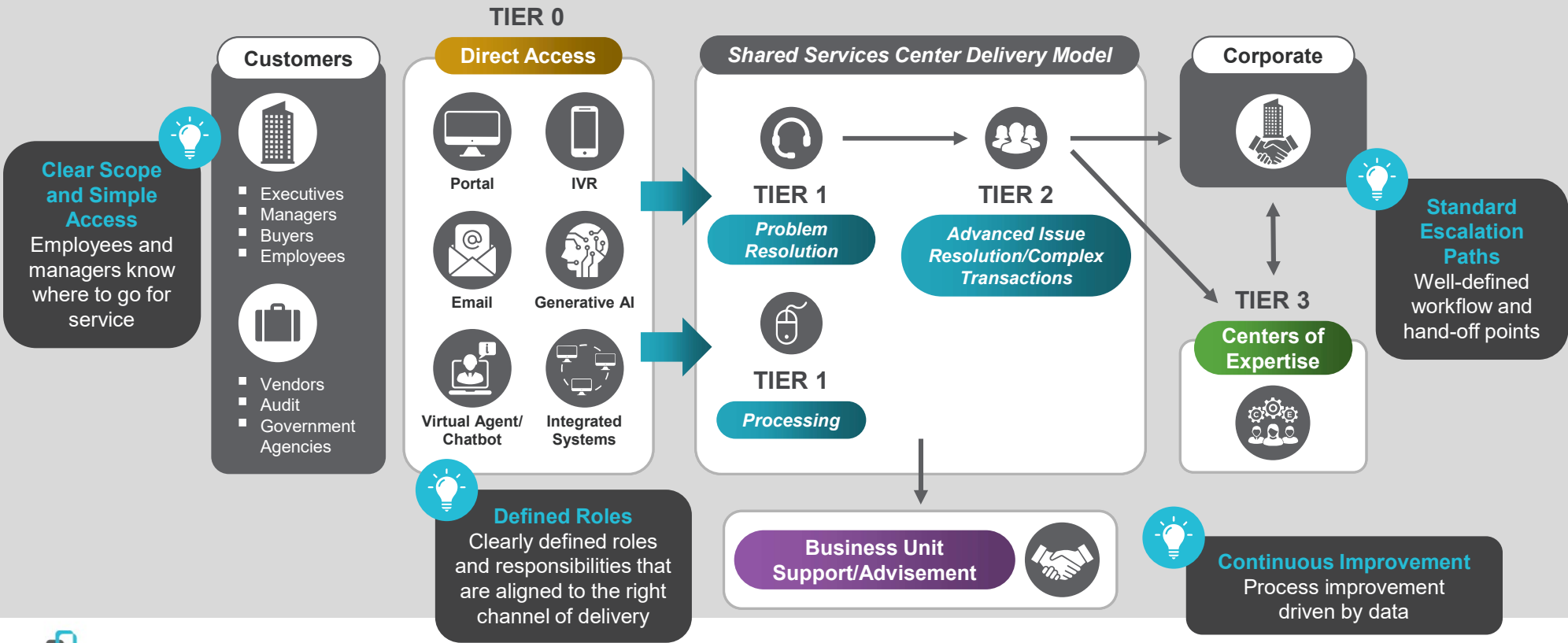
Live Poll!

Where are you in your shared services journey?

- A. 1 year or less post-implementation*
- B. 3-5 years post-implementation*
- C. more than 5 years beyond implementation*

Leading Practices Shared Services Operating Model

Single Source of Content: Centralized portal and knowledgebase with robust search functionality



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 and Leverage Data

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



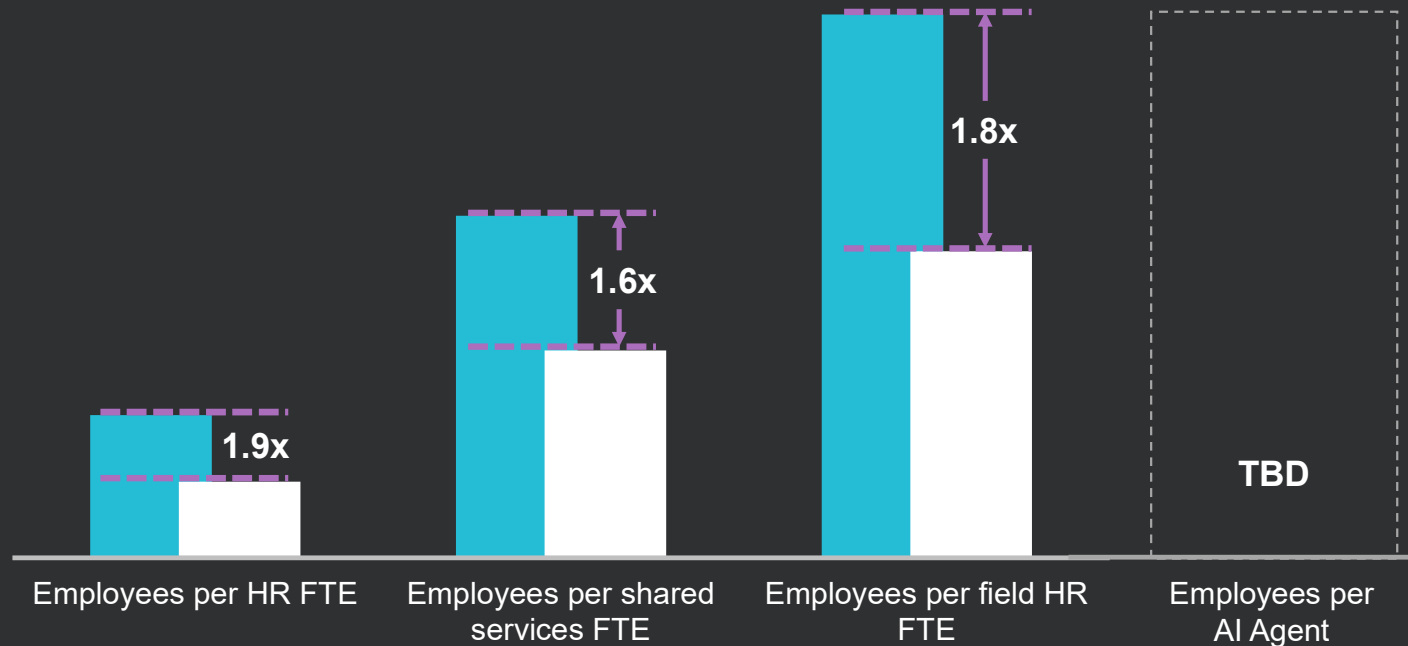
End-to-End Accountability

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



Benefits of Shared Services – HR Benchmarks

Top-performing HR shared services organizations have significantly better staffing ratios at the median, including their employee service centers.



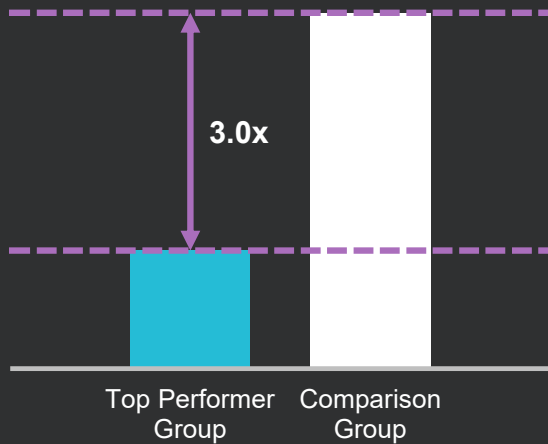
■ Top-Performer Group □ Comparison Group

Benefits of Shared Services – Finance Benchmarks

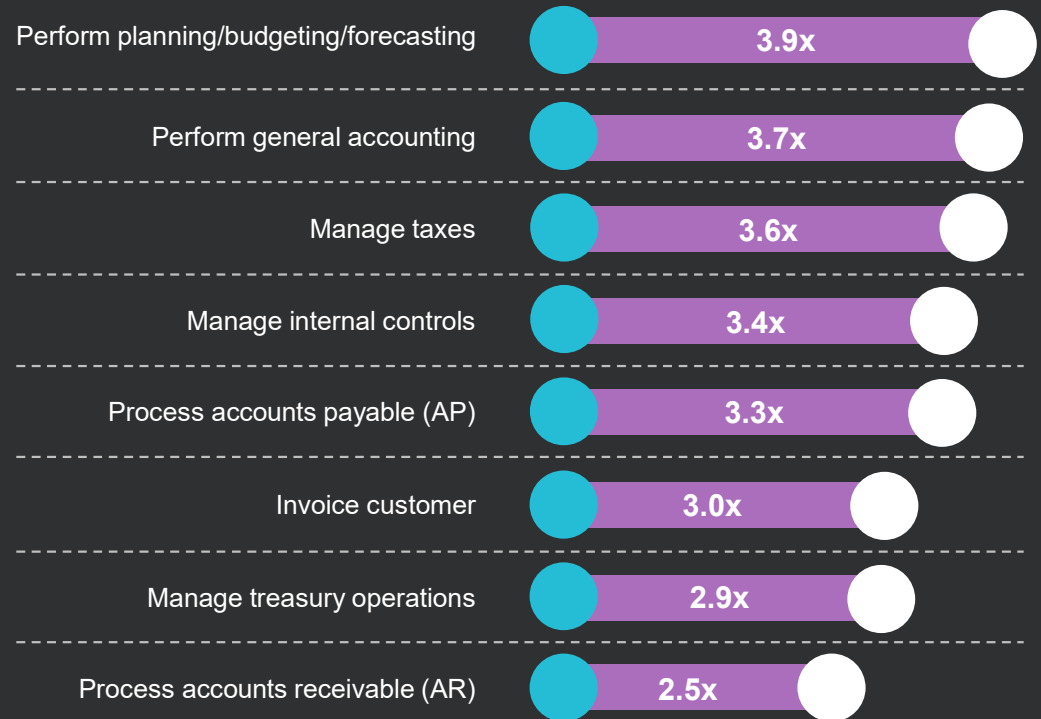
Top-performing finance shared services organizations **have significantly better staffing ratios.**

- Top performers are three times more efficient overall in staffing
- Top performers are 2.5x-3.9x more efficient in staffing major finance processes

Median number of finance function FTEs per \$1 billion revenue



Median number of FTEs that perform the following processes per \$1 billion revenue



Implementation & Optimization: Common Challenges & Mitigation Tactics

COMMON CHALLENGES

Resistance

Silo Mentality

Lack of
Standardization

Internal Focus

Limited Innovation
and Stagnation

Poor Organization
or Skill Alignment

Underestimating Change
Management as
Automation Increases

Treating Shared Services
as Static vs.
Continuously Evolving

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

Opportunities Exist, Regardless of Your Maturity

As maturity increases more demand can be handled with proportionally less effort.



- 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

Shared Services Optimization Framework

As shared services mature, the foundational elements below must evolve together.

Service Delivery Model



- Strategy and Governance
- Scope of Services
- Scope Expansion Strategy
- Sourcing Strategies
- Customer Experience
- Stakeholder Management

Organization and People



- Organizational Structure and Staffing Levels
- Roles and Responsibilities
- Staff Skills, Competencies, and Expertise
- Staff Development
- Career Pathing
- Team and Organizational Culture

Policy and Process



- Policy and Process Harmonization
- End-to-End Process Orientation
- Compliance with Policies and Processes
- Documentation and Resources
- Continuous Improvement Framework
- Operational Processes

Technology and Data



- Applications and Systems
- Metrics and Success Measures
- Reports, Dashboards, and Insights
- Customer Portal and Self-service
- Knowledgebase and Knowledge Management
- Automation/Agentic AI

Future AI-Enabled Service Delivery Model



AI-Enabled Delivery Model



New Candidates and Changes to Delivery Model



Role Changes and Skill Shifts

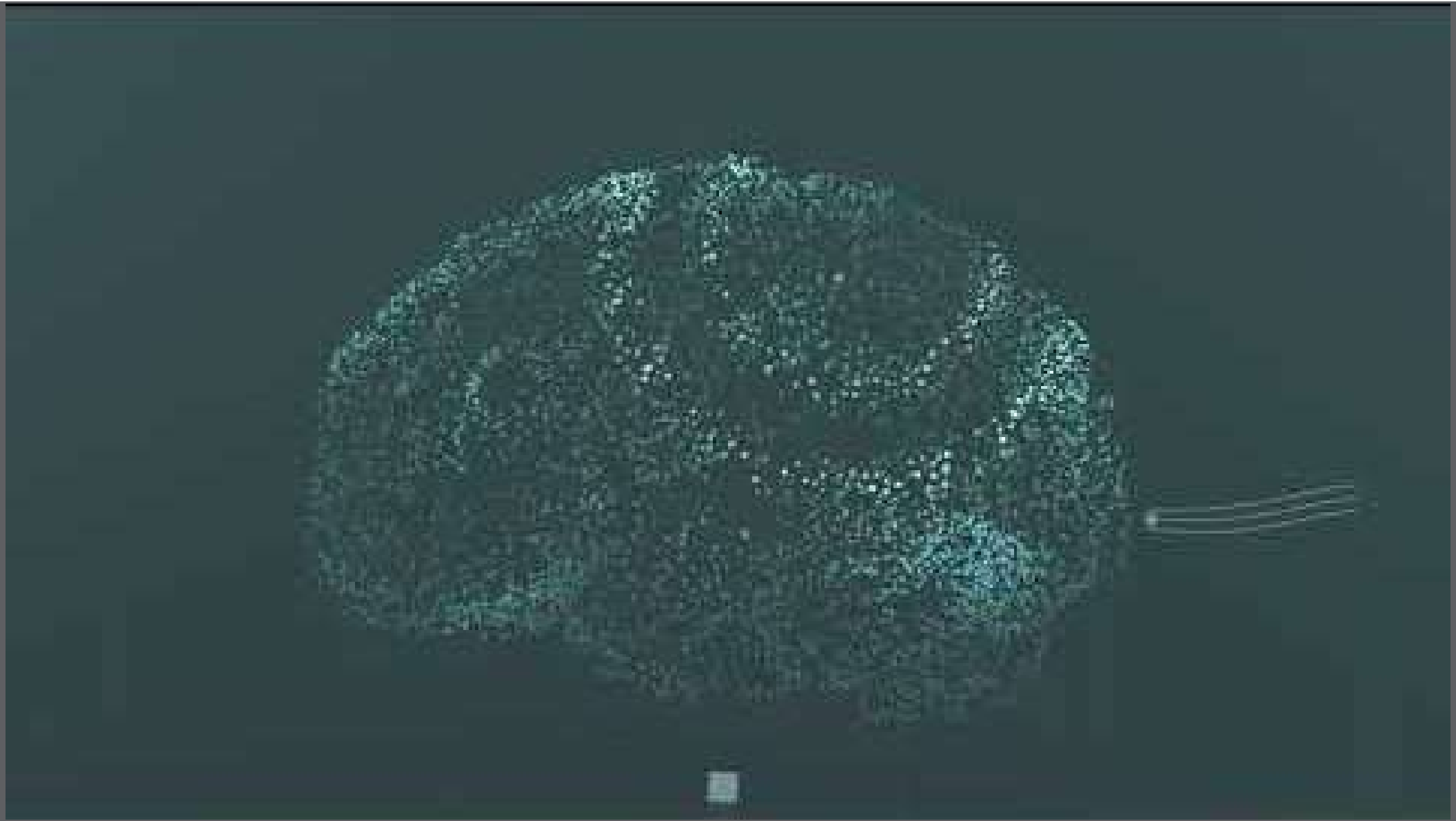
AI Impacts: Questions Shared Services Leaders Are Asking



Shared services leaders are **fielding AI questions from leadership**—and most don't have answers yet.



These are operating model questions—not technology questions.



AI Impacts on the Service Delivery Model

What AI Fundamentally Disrupts

AI breaks the **linear relationship** between volume and headcount.



TRADITIONAL MODEL

Routine work scales with headcount

Tier 0/1 handled by people

Humans do volume work

Service capacity is staffed



AI-ENABLED MODEL

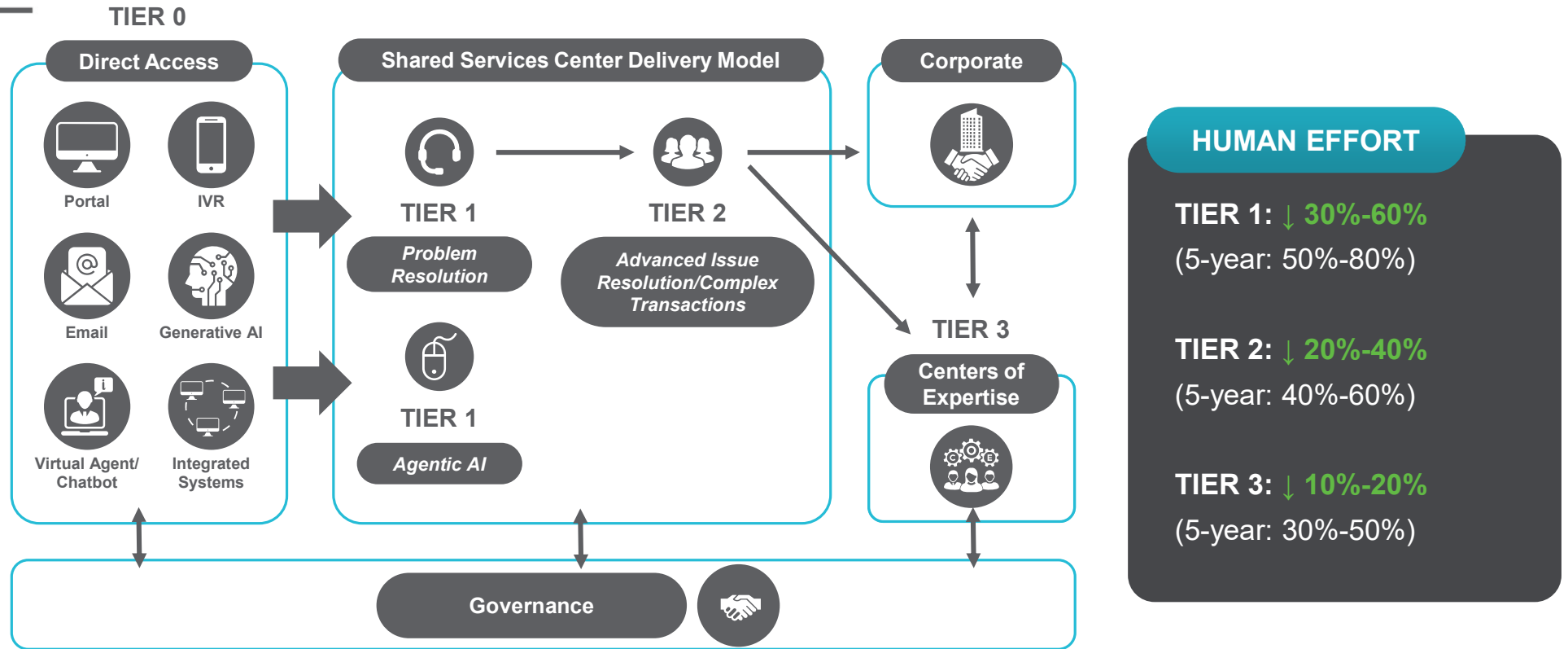
Routine work scales with compute

Tier 0/1 collapses into AI

Humans shift up the value curve

Service capacity is elastic

Setting the Direction for Responsible AI in HR Shared Services

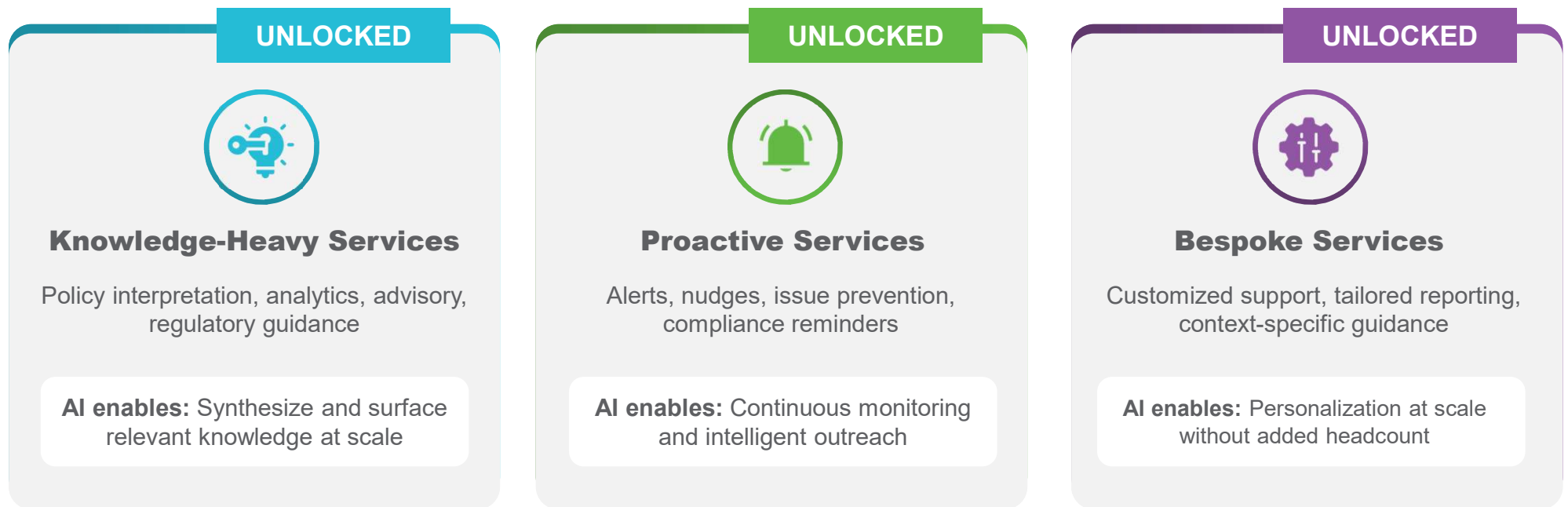


AI becomes part of the tier service delivery model. If HR Shared Services does not have governance to guide how AI is used, the tools will shape the service model on their own.

AI Impacts on the Service Delivery Model

New Candidates for Shared Services

AI makes previously “un-shareable” services viable for centralization.



AI doesn't just make **existing shared services cheaper**—it expands what can be shared.

The Constants

AI changes the “how,” not the fundamentals of accountability, compliance, or expertise.

1

Accountability still sits with humans

AI advises and executes; humans decide and own outcomes. The chain of responsibility doesn't change.



2

Compliance, controls, and auditability remain non-negotiable

Governance frameworks must evolve to include AI, not disappear. Oversight requirements increase, not decrease.



3

Domain expertise becomes more important, not less


AI amplifies experts; it doesn't replace the need for judgment. Someone has to know when the AI is wrong.




*If anything, domain expertise becomes **more valuable**—
because someone has to know when the AI is wrong.*

The Questions Are Changing

Clients are moving from efficiency questions to design questions.

 TRADITIONAL QUESTIONS
1 Where should we locate?
2 How many FTEs do we need?
3 What processes can we standardize?
4 What's the next automation wave?



 EMERGING QUESTIONS
1 What work should <i>never</i> be automated?
2 How do we redesign roles and career paths?
3 How do we govern AI decisions?
4 How do we measure value when volume drops but impact rises?
5 How do we avoid “AI chaos” across functions?

The questions on the left are **still relevant, but they're no longer sufficient.**

Roles Change and Skills Shift

A de-emphasis on function and business unit knowledge.

TODAY

- Intake via email/portal
- Policy lookup, manual routing
- Forms/letters created by hand
- Manual eligibility checks
- Status updates and follow-ups
- Manual escalations and handoffs
- Excel trackers, ad-hoc reporting

WITH AGENTS

- Unified intake
- Policy Q&A auto-resolved
- Forms/letters auto-drafted
- Cross-app workflows
- Exceptions reviewed; prompts improved
- Case summaries for handoffs
- Built-in audit trail and metrics

SKILL NEEDS

Prompt/agent design

Workflow orchestration

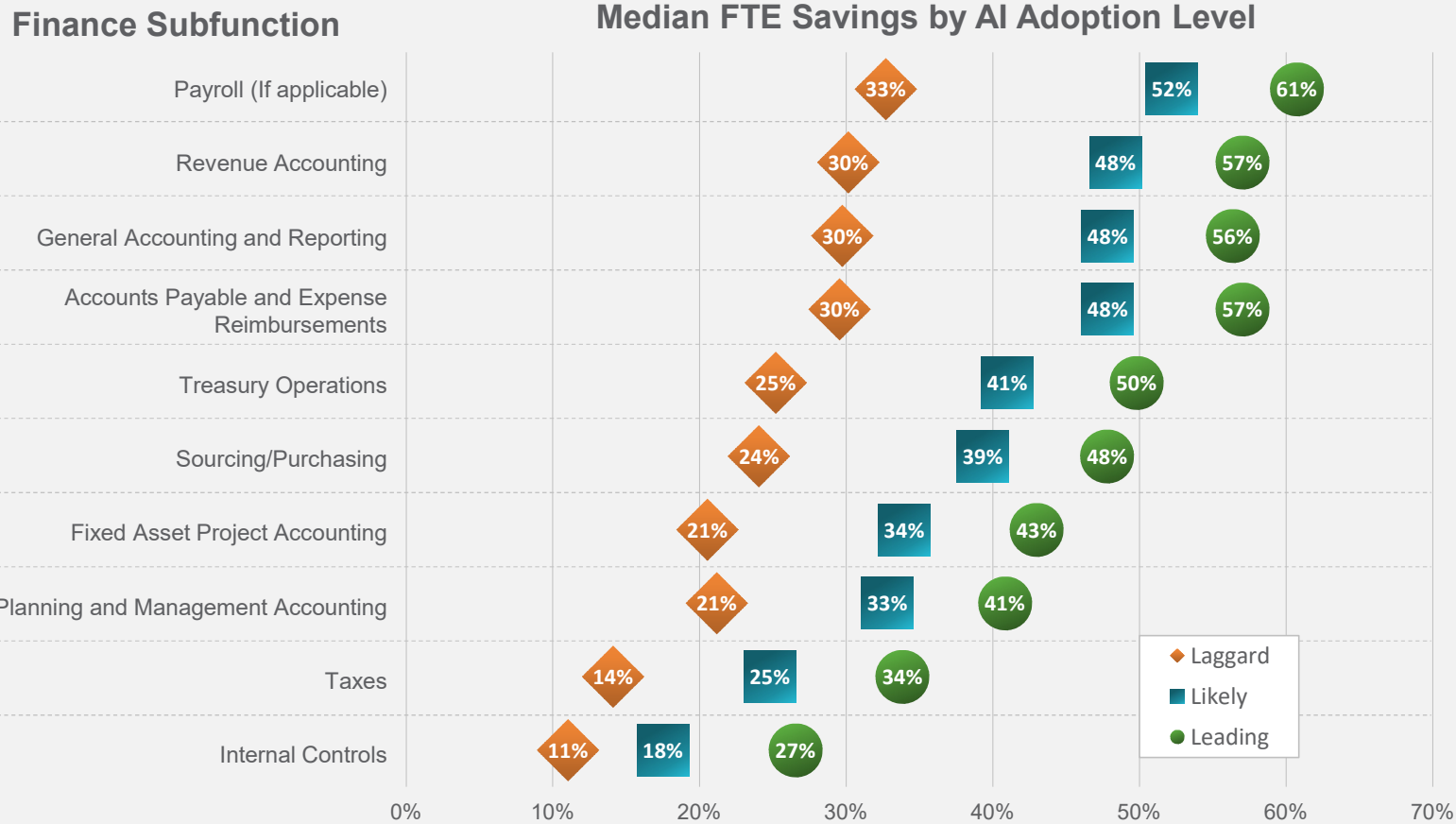
QA & exception handling

Controls and compliance

Data analysis and metrics

Project/change management

Example: AI Automation Potential Varies by Finance Subfunction



This chart illustrates the percentage of work within each Finance subfunction that is automatable – i.e., automation potential relative to the subfunction itself.

Service Delivery Model



Ensure the Right Governance
(including oversight of AI-enabled services)



Continuously Evolve the Model



Rebalance Internal, AI, and External Capacity

Dealing with Strategic Changes

Changes in strategic direction are common as companies pivot to address market changes and pressures.

Are your SSC operations pivoting and evolving to meet strategic needs? Do you have the right governance in place?

Increased Value

- Are we continuing to optimize and add value through expansion and integration?



Outsourced Providers

- Outsourcing unstable or disparate processes is never a recipe for success
- Are there processes that have stabilized under SSC control that would now be candidates for outsourcing?



Are there outsourced processes that would be better managed by the SSC or eliminated by AI?

Acquisitions

- While you were busy building and stabilizing your SSC, your company made acquisitions. Some of them may even have their own SSC operations...
- Is now the time to integrate them and their standardized practices?



Establish Strong Governance

A governance structure drives increased engagement and accountability within the shared services organization, creates an overall mechanism to manage and prioritize issues/opportunities, and adds visibility for leadership.



Post-implementation Governance Focus

- Govern policy, process, technology, and AI-enabled service changes
- Manage service evolution across employee populations and use cases
- Review performance, experience, and automation effectiveness metrics
- Monitor performance, exceptions, and escalation trends



Key Considerations

- Match the governance structure to the potential for issues
 - Small potential for differences = less formal and structured governance
 - Large potential for differences = more formal and structured governance
- Incorporate customers and partner representation
 - Allows customers to influence direction of the service center and ensures responsiveness to business needs
- Establish criteria for evaluating issues and making decisions
- Define guardrails and decision thresholds for AI-enabled work

Governance vs. Execution

Governance Layer

Identify and prioritize the list that needs to be worked

- Thematic issues
- Prioritization of focus
- Status of existing enhancements
- Maintenance of cross-functional discussion/partnership
- Guardrails for AI autonomy and escalation

Company Leaders

Business Customers

Shared Services Leadership

Shared Services Operational Leaders

Execution Layer

Support, assign resources, and drive completion against the list

- Coordinate and distribute work across teams, using AI for standardized tasks
- Define and execute resolution actions, with humans handling judgment and exceptions
- Report status, performance, and exceptions to governance bodies

Continuous Improvement

Customer Care

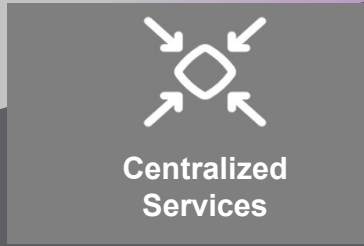
Tier 2 Functional Groups

End-user Technology Support

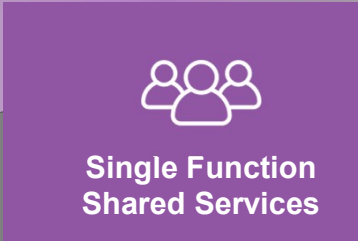
Evolve the Model to Drive Increased Value

As companies implement a shared services growth strategy, they realize increasing value from the model.

Realized Value, Effectiveness, and Maturity



Work consolidated into a single organization, but processes and delivery model have not changed



Processes optimized and organization operates as a customer-focused business within a business



More than one function is managed within a single shared services organization; delivery remains functionally aligned



Delivery model transformed to integrate work across functions and further optimize processes

GBS Characteristics

Global Business Services (GBS) is the integrated services capability of an enterprise, focused on the delivery of transactional and analytical work supporting the business units and corporate, under a single organizational structure.

Leading GBS models demonstrate five characteristics:

- 1 Deliver services to a global customer base
- 2 Report to one person with responsibility for an overall budget
- 3 Share infrastructure, including locations and technology platforms
- 4 Incorporate end-to-end process ownership
- 5 Include some level of higher-value activities



Service Delivery Model

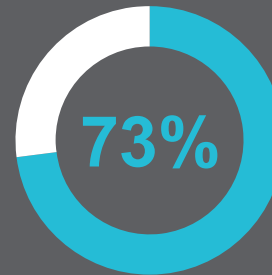
GBS Adoption Rates

GBS has emerged as the standard operating model for internal enterprise services.

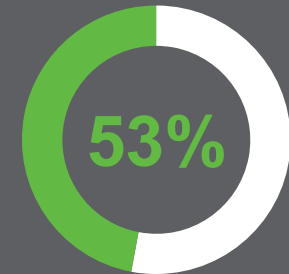


Trend points toward a continuing migration to a Global Business Services model with **more than 90%** of the Fortune 1000 **considering a move within the next three years.**

Adoption Rates



73% of Top 1,000 **companies with two or more functions** moving toward a GBS model



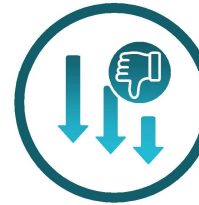
53% of Top 1,000 **companies with three or more functions** moving toward a GBS model

Advantages and Disadvantages of Growth



Advantages of Growth

- The shared services model works to:
 - Improve service delivery
 - Lower total costs
- Economies of scale
- Synergies (e.g., onboarding of new employees)
- Standardization of processes and elimination of redundant processes
- Shared technology
- Shared management and administration
- Cross-training
- Additional advancement opportunities for shared services employees
- Improved customer service
- Allows business units to focus on core processes



Disadvantages of Growth

- Investment requirements – upfront costs to transition and centralize technology, staff, equipment, and facilities
- Additional bureaucracy
- Size can hamper responsiveness
- Requires broader technical expertise at the top to manage additional functions
- Perception of kingdom-building
- Potential impacts to employees currently performing the work

Despite potential disadvantages, a successful shared services organization must continue to grow, evolve, and demonstrate additional relevance. Failure to do so will lead to stagnation.

Outsourcing as a Strategy?

Outsourcing has been an effective strategy employed by many (if not most) shared services organizations. Choosing the right time to outsource is critical to the strategy's success.

Benefits to Outsourcing

- **Cost Savings:** Outsourcing can reduce operational costs, including labor, infrastructure, and overhead expenses
- **Access to Expertise:** Gain access to specialized skills and expertise not available in-house
- **Focus on Core Activities:** Allows the organization to focus on core business functions and strategic initiatives
- **Scalability:** Easily scale operations up or down based on business needs without the burden of fixed costs
- **Improved Efficiency:** Outsourcing to specialized providers often leads to increased efficiency and productivity

CAUTION

It might be time to revisit Outsourcing strategies vs AI strategies...

Why outsource processes that can be improved or eliminated with AI??

Processes that are stable and standardized are ideal candidates for inclusion in an outsourcing strategy, freeing up resources and focus for new opportunities and challenges.

Creating Room for Agentic AI within Existing BPO Contracts

Reduce Demand Before It Hits the BPO

- **How:** Deploy agentic AI upstream for intake, triage, and self-resolution so fewer requests reach the provider
- **Why feasible:** Fully client-controlled and outside BPO contract scope
- **Impact:** Immediate volume reduction and cost avoidance with minimal risk

Change Governance Before Commercials

- **How:** Update service tiers, prioritization, and escalation rules so AI handles low-complexity or predictable work
- **Why feasible:** Governance changes are rarely contractually constrained
- **Impact:** Better capacity utilization and faster turnaround times

Use Technology Enablement and CI Clauses

- **How:** Allow providers to use agentic AI as part of their delivery approach to meet CI obligations without changing SLAs
- **Why feasible:** Most BPO contracts already permit new tools and methods
- **Impact:** Productivity gains and margin protection without renegotiation

Shift to Output-Based Management (Internally)

- **How:** Manage performance to outcomes (cycle time, resolution, SLA attainment) while contracts remain input-based
- **Why feasible:** Requires no contract changes – only management discipline
- **Impact:** Lower effective cost per transaction and improved transparency

Position AI as Assistive, Not Substitutive

- **How:** Frame AI as augmenting human agents (drafting, pre-processing, decision support) while humans remain accountable
- **Why feasible:** Avoids headcount, scope, and pricing triggers
- **Impact:** Higher throughput and quality without contractual disputes

Use Gainshare and Innovation Provisions

- **How:** Share AI-driven productivity gains temporarily through gainshare or innovation clauses
- **Why feasible:** Aligns incentives and protects provider economics in the short term
- **Impact:** Early financial benefits and a data-backed case for future rebasing

Future outsourcing models should assume declining human volume over time.

People and Organization



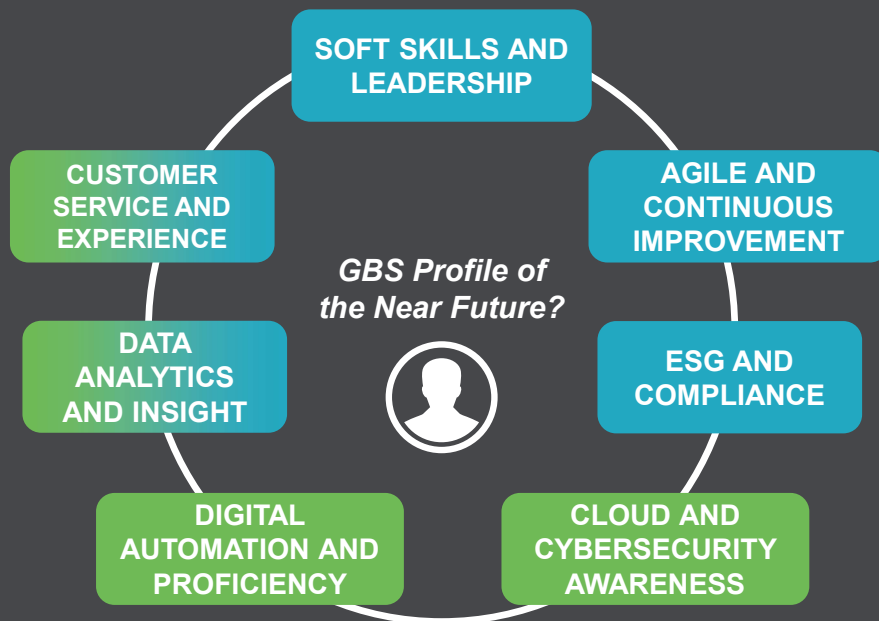
**Evaluate
Competencies and
Upskill Staff**



**Cultivate Employee
Engagement**

The Changing Skillsets of Your GBS Organization...

We are observing multiple changes in the demands on GBS organizations that are driving an adjustment in skillsets and focus of your employees. Getting ahead of these will be critical to remain effective for the customer base.



What we are hearing and observing from our clients...

- A** **Increasingly customer centric** – being more proactive, responsive and with even more partnership with the business
- B** **AI knowledgeable and focused** – having experience, knowledge, and ability to identify (and use!) AI to accelerate the work and empower the end user
- C** **Greater strategic and business mindset** – shifting away from just transactional work means we are asking our employees to have greater business acumen and ability to be consultative advisors

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.

Competencies for GBS personnel are evolving significantly. Proficiency with AI and other technologies are now essential.

Evaluate the Organization's Competencies

Developing a process or tool for measuring the organization's level of proficiency across the competency framework can identify group and individual strengths and gaps. Results allow leadership to better align employees in their current roles, in growth opportunities, or in succession planning while highlighting needs for securing new talent.



ASSESS

- Define competencies by level
- Collect ratings from the employee and two additional raters (typically the manager or a peer)



IDENTIFY

- Tabulate results tabulated by individual, career level, organization, or other demographic breakdowns



PLAN

- Plan improvement opportunities for the organization
- Tailor personalized feedback based on individual results

People and Organization

Let's Hear From You

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

Policy and Process



**Augment Process
Design with User
Experience Design**

Process Improvement – The Next Step

As your shared services organization matures and continuous improvement becomes a larger action area, it's time to take a deeper look at processes that need attention. While this might involve designing processes that are added to the SSO's function, it could also be focused on improving processes you already have.



Design New Processes

Processes that are added to the scope of the SSO because of evidence of success, trust, or a previously planned transition



Redesign Existing Processes

Processes conducted by the SSO today, including the particularly tough ones

Adding User Experience to Traditional Process Design

User experience (UX) is different from the traditional assessment and solutioning approaches. While still process-oriented, the customers are the focal point of the evaluation as opposed to the practitioners.

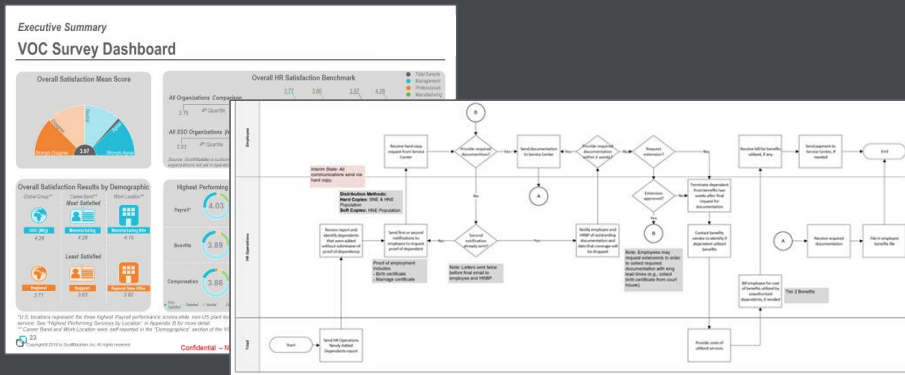
Traditional Assessment/Solutioning

- Volume and process data
- Stakeholder (practitioner/SME) interviews
- Process maps (visualize process)



UX Assessment/Solutioning

- UX surveys (process focused)
- Customer interviews
- Journey maps (visualize customer actions and pain points)



User-experience Design Key Steps

Define Personas and Collect Information

Planning and research on users is the foundation of rethinking the process

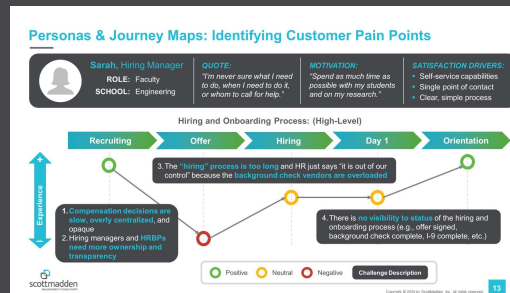
- Define the key stakeholders, or personas
- Collect data on the process; e.g., case data, customer satisfaction results, and administer process surveys
- Interview 3-5 people per persona



Construct Journey Maps by Persona

Journey maps highlight the UX, pain points, and opportunities for improvement

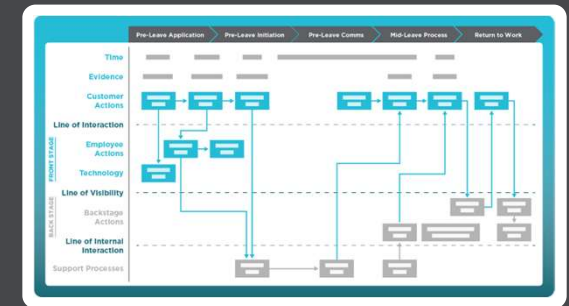
- Break the process into high-level steps
- Rate experience at each step
- Call out key pain points



Create Service Blueprint

Service blueprints provide an extra level of detail to support a user journey map

- Add detail on customer actions, front stage actions, backstage actions, and support processes



UX design should be incorporated into the traditional process design approach. Layer the journey maps into future state process maps before finalizing processes.

Technology and Data

1



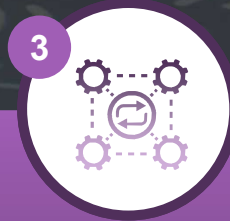
Discuss Supporting Technologies

2



Explore Intelligent Automation

3



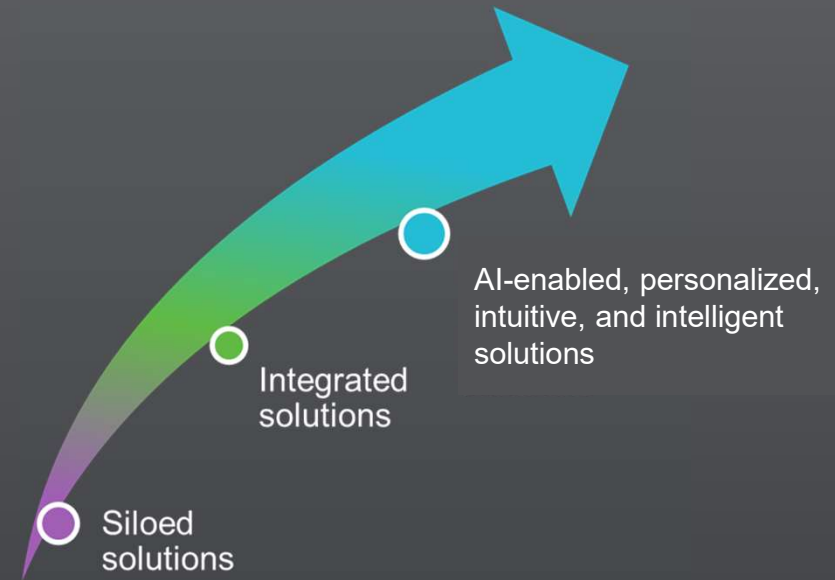
Deep Dive into Data and Analytics

Supporting Technologies Maturity Curve

Consumer-grade solutions are desired by employees

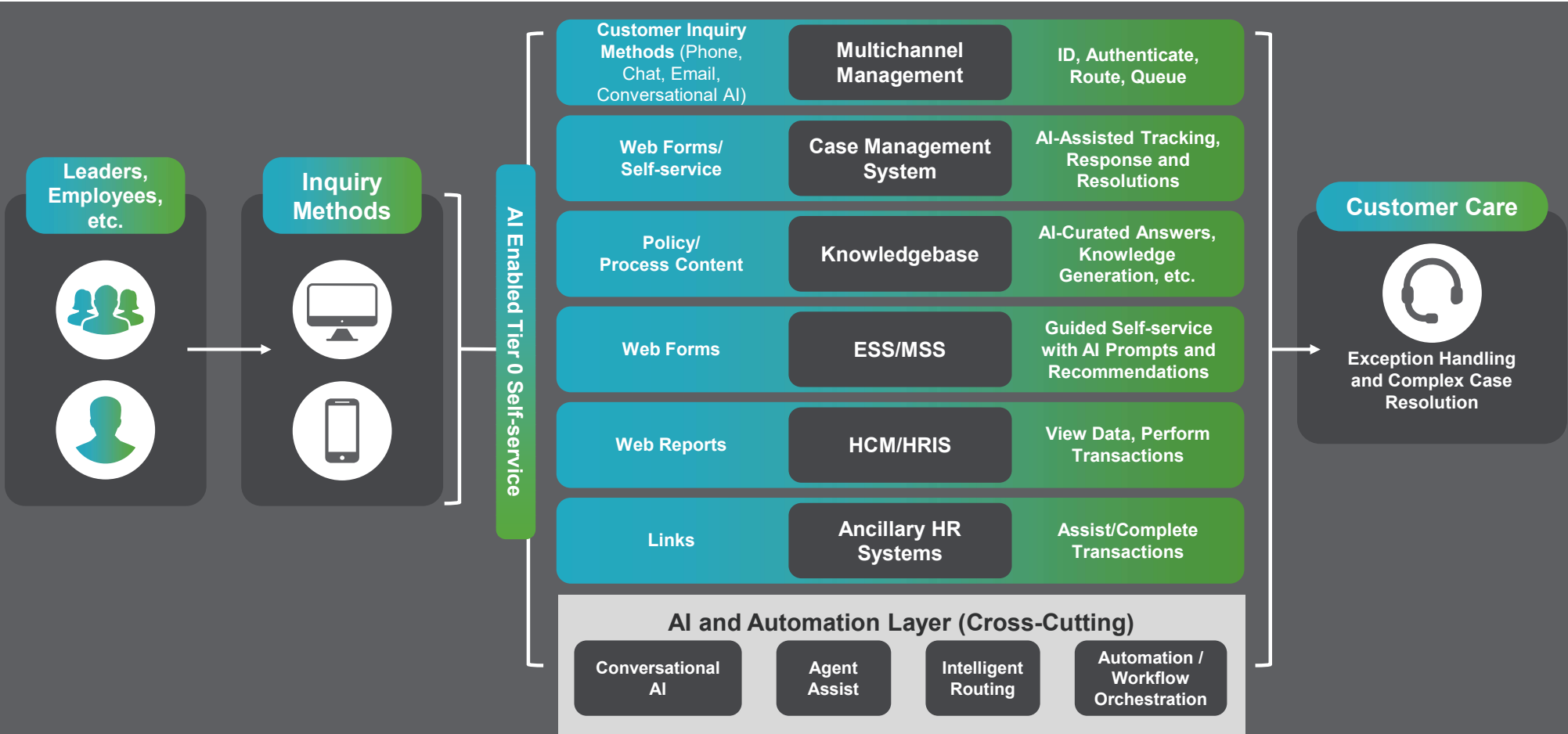


AI accelerates movement up the maturity curve.

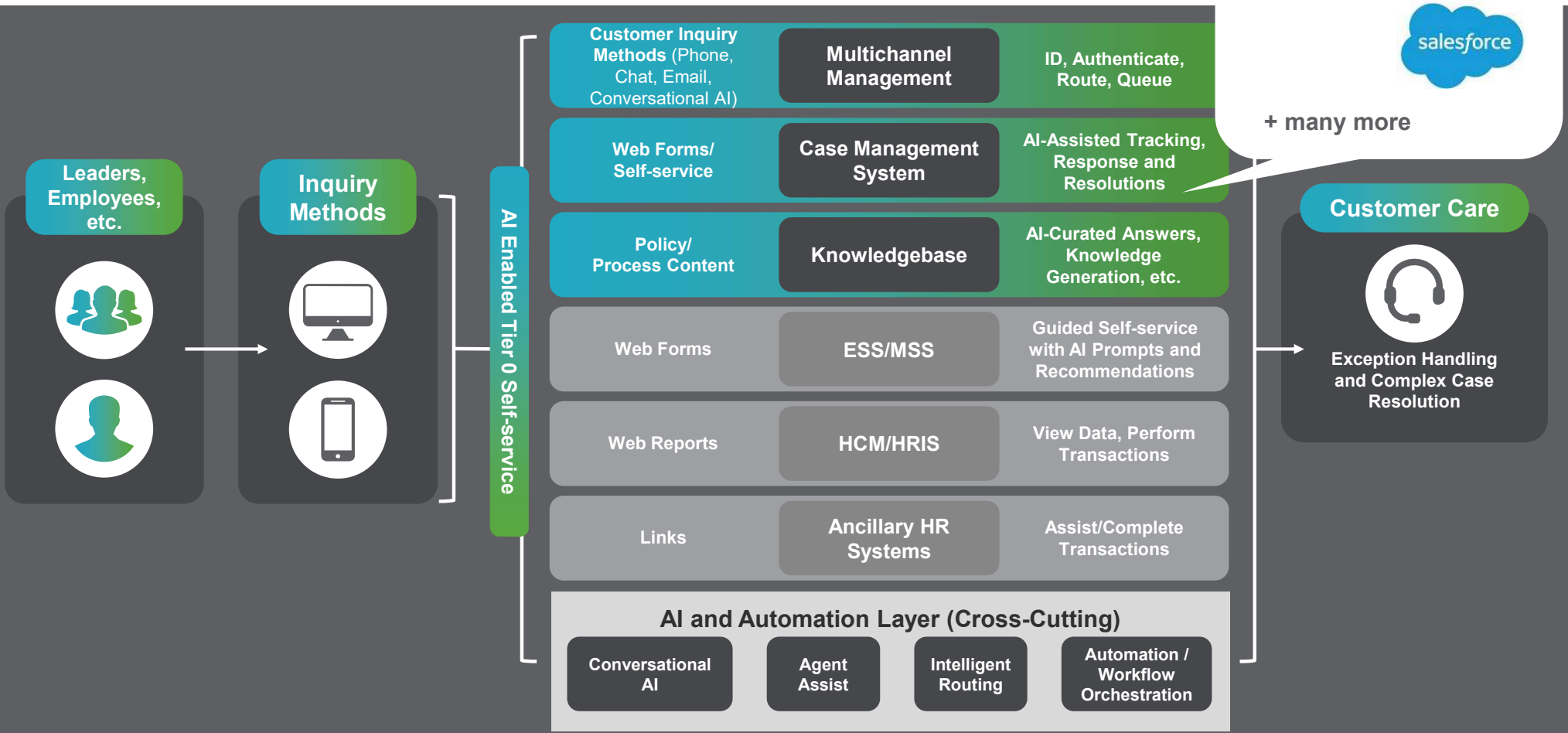


A well-designed, AI-enabled, and integrated suite of solutions enhances the employe experience, increases efficiency and productivity, and improves communication

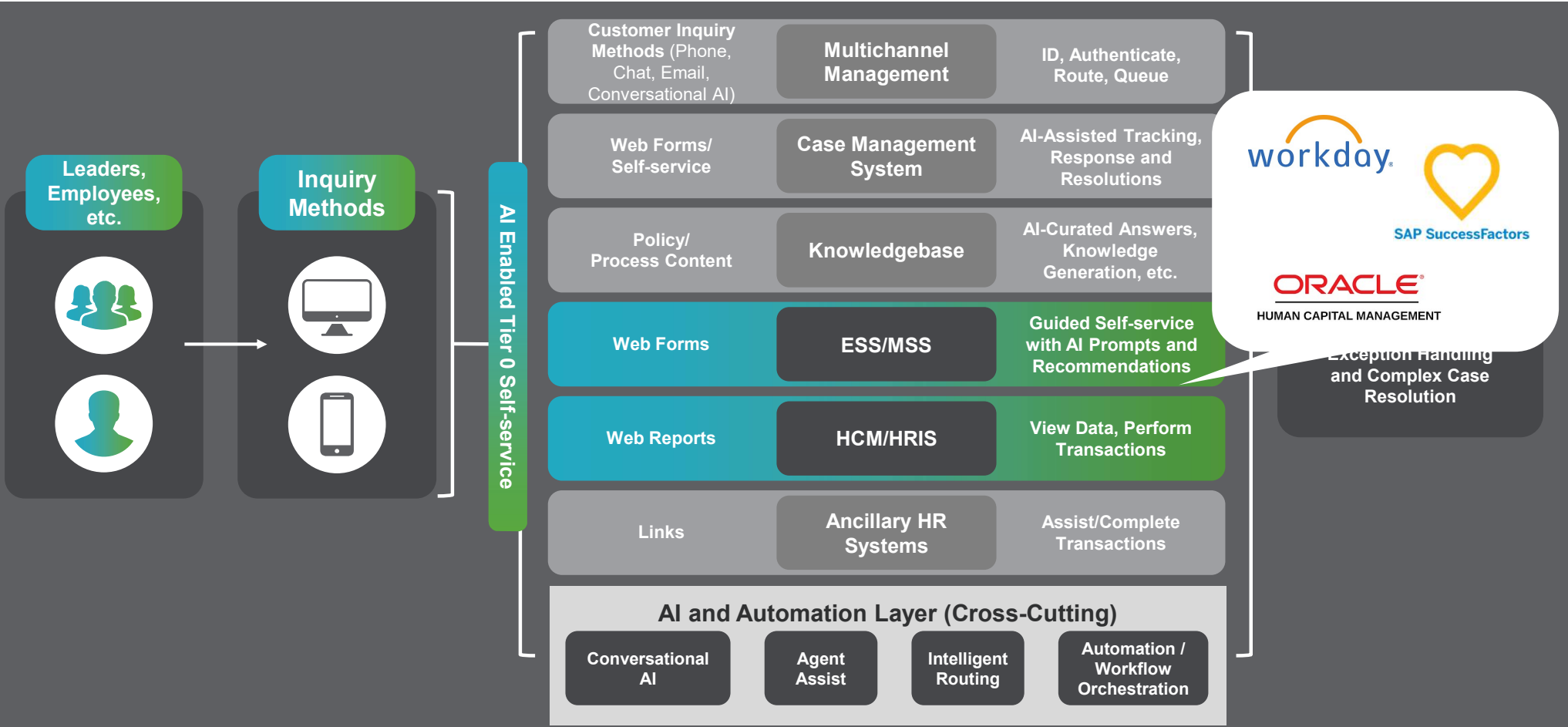
Suite of Customer Self-service Tools



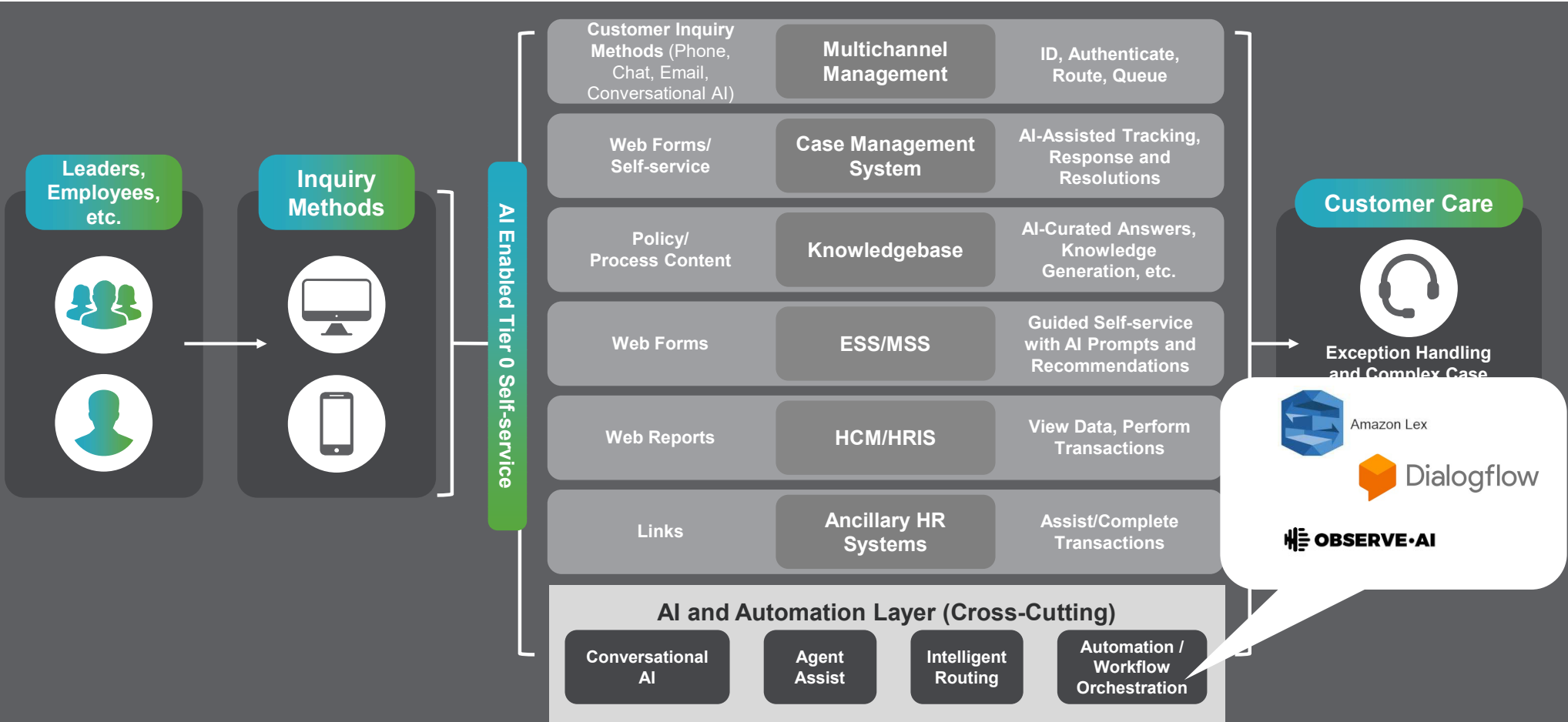
Suite of Customer Self-service Tools



Suite of Customer Self-service Tools

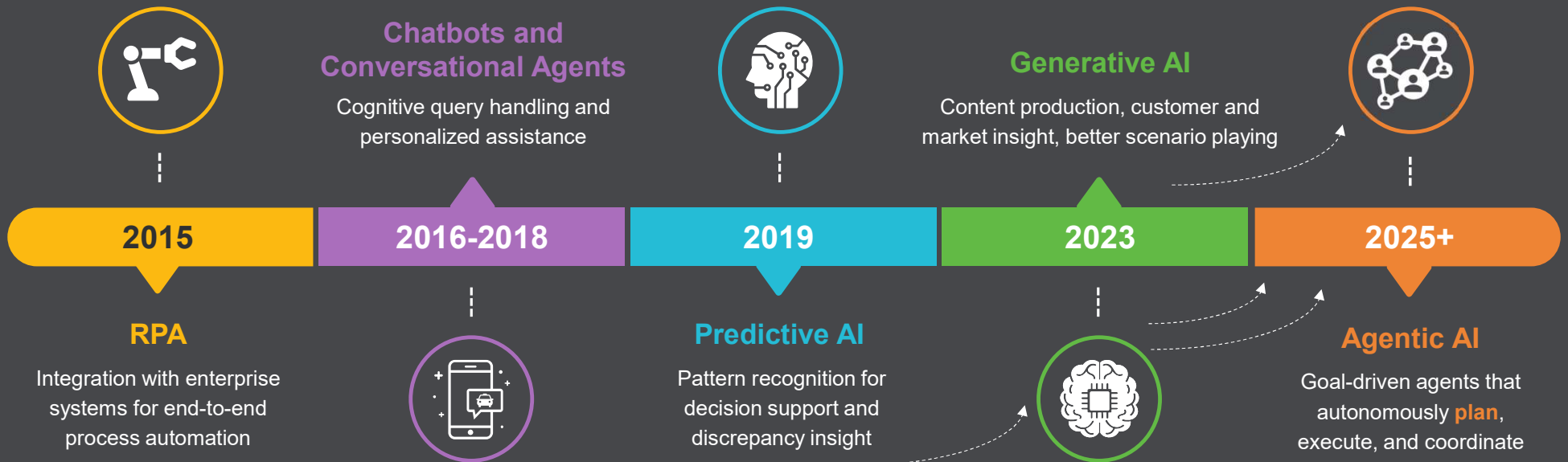


Suite of Customer Self-service Tools



Intelligent Automation's (IA) Impact on Organizations over the Years

In recent years, corporate services has witnessed a significant adoption of IA technologies to streamline operations, automate repetitive tasks, and improve customer interactions.



What's New with Agentic AI

- Plans multi-step **workflows**
- **Executes** across systems and **vendors**
- **Learns from outcomes** and adapts
- **Escalates to humans** when thresholds are met

Agentic AI

What Is Agentic AI?

Agentic AI represents autonomous systems that can perceive their environment, make decisions, and take actions to achieve specific goals—without requiring constant human intervention.

Beyond Traditional AI

Traditional AI: Responds to prompts, provides recommendations

Agentic AI: Executes multi-step workflows, adapts strategies, learns from outcomes

Key Capabilities



Autonomous Operation

Executes complex tasks end-to-end without human micromanagement



Intelligent Decision-Making

Evaluates options and selects optimal paths based on contextual understanding



Dynamic Adaptation

Adjusts strategies in real-time based on changing conditions and feedback

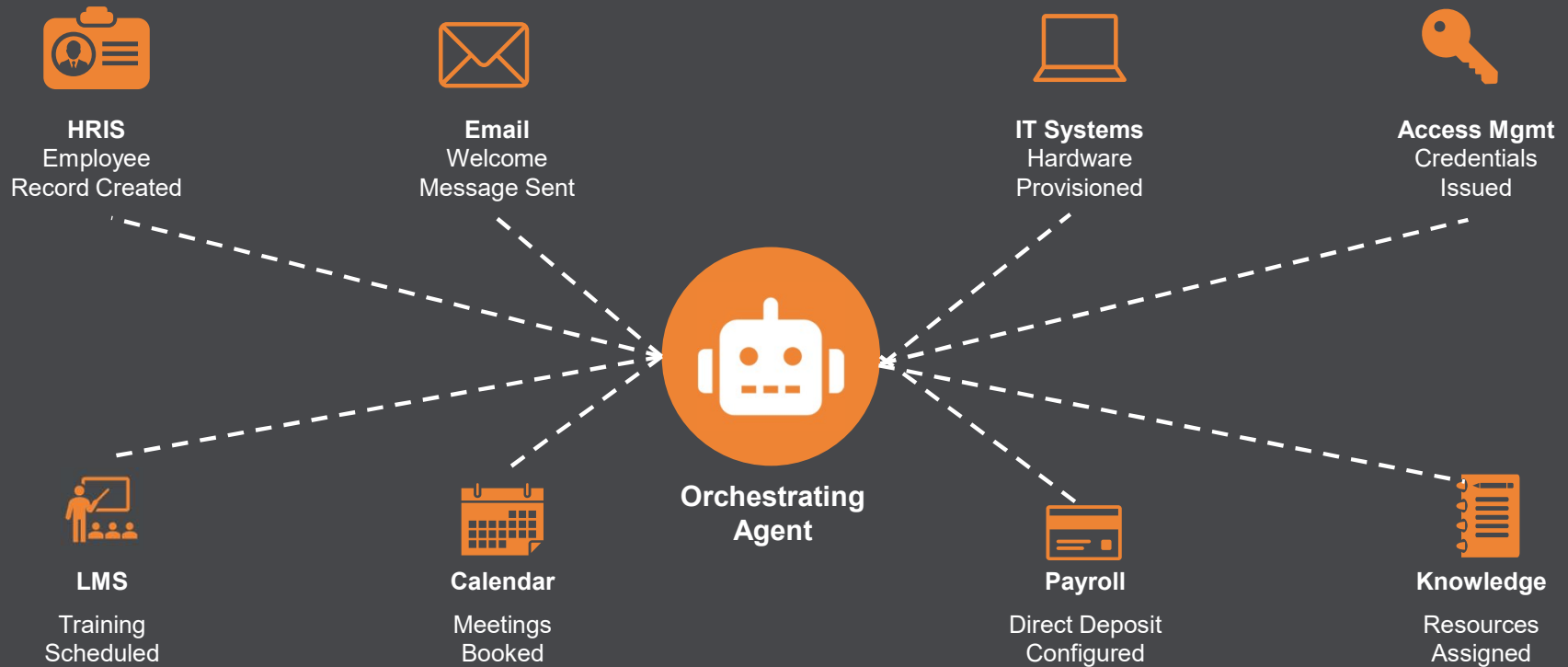


Continuous Learning

Improves performance through experience and outcome analysis

Enterprise Impact:
40%-60% reduction in manual workflows, enabling strategic redeployment of knowledge workers

Agentic AI in Action: Employee Onboarding



What types of use cases are you currently pursuing with AI?

- A. Analytics and insights generation
- B. Improved customer experience
- C. Unstructured data classification and structuring
- D. Text summarization
- E. Augmented knowledge management
- F. Content creation
- G. Configuration support and coding
- H. None, yet
- I. Other

Service Experience Reimagined: Conversational Enterprise Interfaces

From portals and forms → to intelligent, conversational interfaces, The user no longer navigates shared services. Shared services understands the user.



Conversational Front Door to GBS

One interface. Every function.

- Single AI entry point across HR, Finance, IT, Supply Chain
- Natural language replaces category navigation
- Cross-functional workflows triggered behind the scenes
- No more “Which team owns this?” friction\

Result: Integrated experience instead of functional silos



Multimodal AI

Text. Voice. Image. Embedded in the flow of work.

- Voice-enabled support for frontline environments
- Image capture for invoices, receipts, claims
- Mobile-first conversational workflows
- Video-based troubleshooting support

Result: Access to GBS without stopping work



Personalization Engines

Context-aware service at scale.

- Role-based and location-aware responses
- Life cycle-based prompts (new hire, manager, supplier)
- Historical interaction learning
- Predictive suggestions before requests are made

Result: Service adapts to the user—not the opposite



Experience Measurement Redesign

New metrics for a new interface. Move beyond:

- Ticket volume, handle time and portal clicks

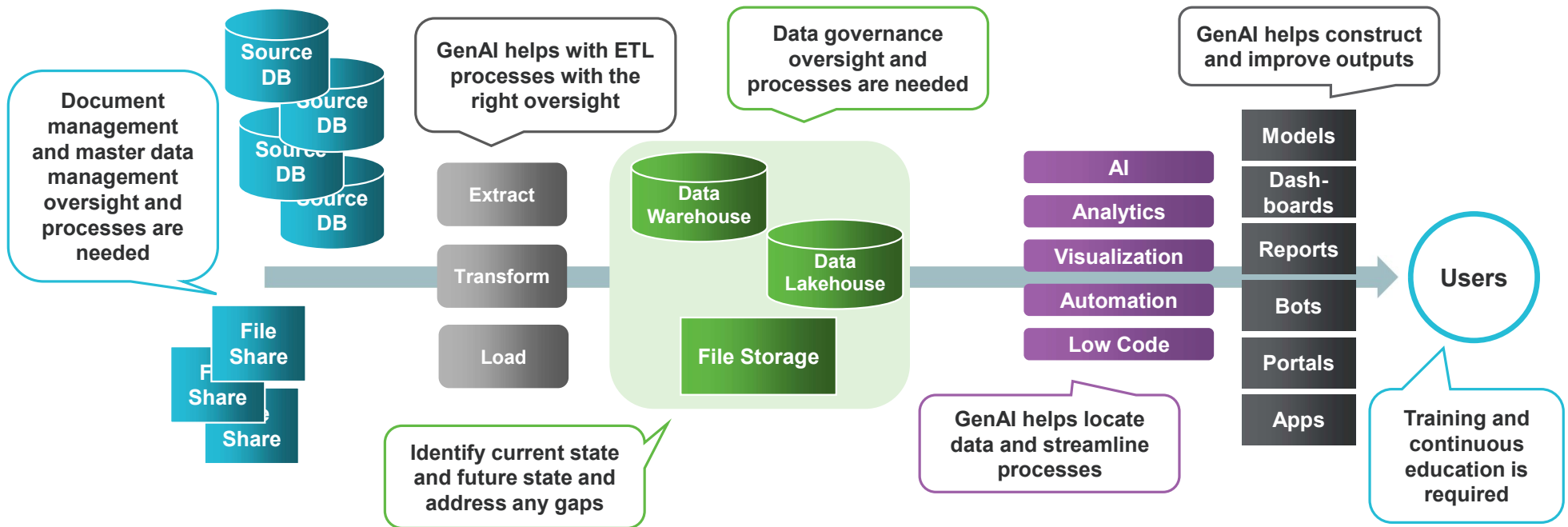
Measure instead:

- Containment rate/effort score, time-to-resolution, proactive issue prevention

Result: GBS evolves from transaction efficiency to experience engineering

Structuring Data for AI Is Critical

Appropriate data structure has long been important for accurate and efficient data analysis, and it remains a priority for GenAI applications. The diagram below shows where GenAI can be a force-multiplier in the process.

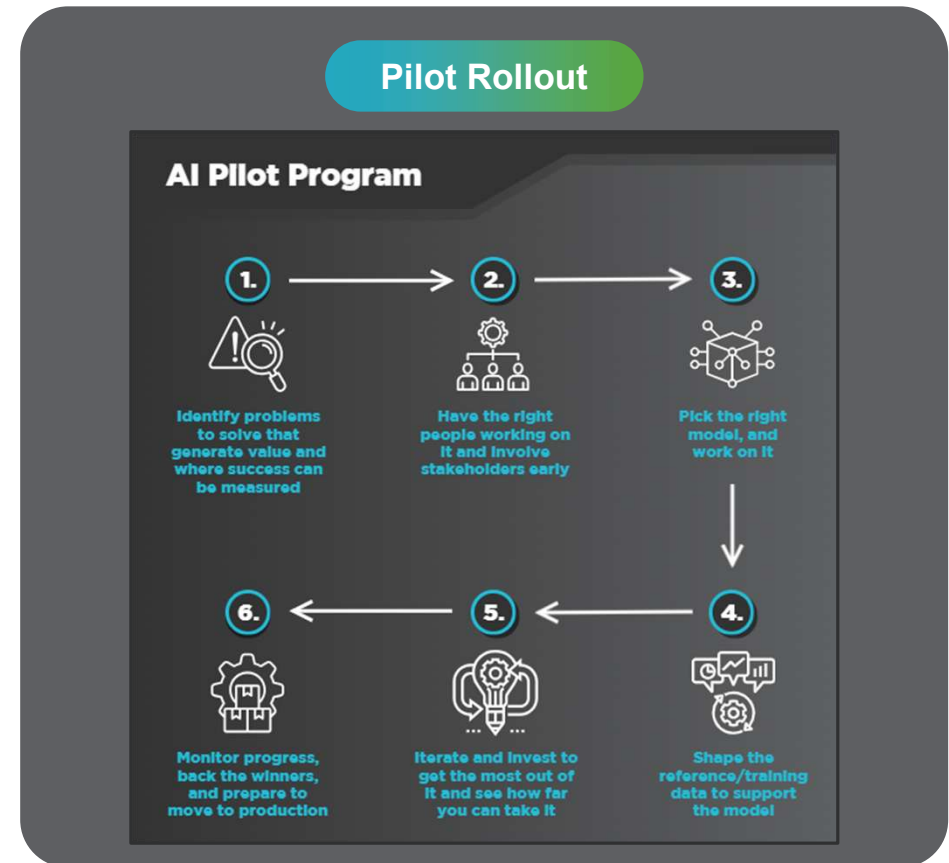


Case Study

Pilot and Phased Rollout Framework for AI Technologies

In the rapidly evolving world of AI, running a successful pilot program can seem daunting. The challenges are numerous, ranging from selecting the right use case to ensuring the technology effectively meets business needs

- **Selecting the Right Use Case.** Identify high-value use cases that have the potential to deliver “needle-moving” results. Focus on a manageable number of use cases relative to the size of your testing team. Set clear, measurable goals for each use case
- **Assembling Your Team.** Select team members who are skilled and genuinely interested in AI technology. Utilize small groups for each use case to encourage diverse perspectives and approaches. Ensure subject matter experts are involved in testing and engage key stakeholders, such as Legal, IT, Controls, and HR, early in the pilot
- **Configuring the Model.** Choose a model that aligns with the specific needs of your business case. Develop precise and effective prompts that guide the AI to generate relevant and useful outputs
- **Managing Data Effectively.** Define and provide the necessary support documents for each use case. Source documentation format critically influences pilot outcomes. Maintain meticulous records of the data used during testing
- **Embracing Iteration.** Adopt an iterative process in your pilot program. The learnings from each phase should inform subsequent efforts, continuously refining the approach and technology used
- **Monitoring Progress and Adjusting.** Establish regular intervals for interim updates to assess progress against goals and adjust strategies as necessary. Stay adaptive to changes in source material and advancements in AI tools



Launching a Successful AI Pilot Program: A Guide for Executives - ScottMadden

AI Controllership M&A Playbook

CURRENT STATE



VISION



Frequent acquisitions



Repeatable and scalable, yet tailored



Limited timeline visibility across (heavy deadline pressures)



Upstream dependencies and durations identified



Highly dependent on “people knowledge” vs. repeatable project plans



Comprehensive knowledge repository of M&A tasks across controllership

DELIVERED SOLUTION

- ✓ **Full playbook dataset**
18 functions, 350+ M&A tasks mapped to deal scenarios, M&A life cycle stages, processes
- ✓ **AI automation and enablement**
Task selection, task scheduling, and project plan generation
- ✓ **Gantt Chart Template**
Plug-and-play Gantt visualization of playbook output generated by the AI tool



1. Insufficient Data Quality

Using poor-quality or incomplete data can lead to inaccurate models. Ensure your training data is clean, relevant, and representative of the problem you're solving.

2. Overfitting

Overfitting occurs when a model performs well on the training data but poorly on unseen data. Regularization techniques and validation sets can help prevent this.

3. Ignoring Ethical Considerations

GenAI can inadvertently learn biases present in the data. Be mindful of fairness, transparency, and ethical implications when deploying models.

4. Lack of Explainability

Black-box models can be challenging to interpret. Prioritize models that provide insights into their decision-making process

5. Choosing the Wrong Algorithm

Selecting an inappropriate algorithm for your use case can hinder performance. Understand the strengths and limitations of different GenAI approaches.

6. Inadequate Model Evaluation

Properly evaluate model performance using relevant metrics. Avoid relying solely on accuracy; consider precision, recall, F1-score, etc.

7. Ignoring Deployment Challenges

Deployment involves integrating GenAI into existing systems. Consider scalability, latency, and maintenance requirements.

8. Not Involving Domain Experts

Collaborate with domain experts to validate model outputs and ensure they align with real-world expectations.

Common Pitfalls and Risks

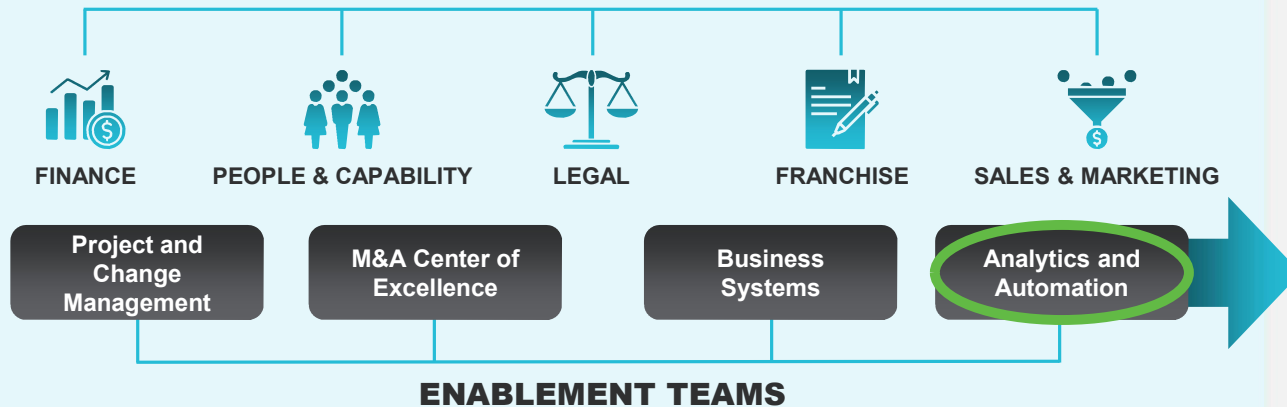
ScottMadden Case Study

Automation CoE

GLOBAL BUSINESS SERVICES

Company's partner of choice in enabling business operations efficiency, productivity, and growth.

OPERATIONAL TEAMS



1,000+ professionals

200+ services

6 locations

GBSC Analytics and Automation

Focused on delivery against operational expectations for investor relations reporting, GBSC operational analytics metrics, SLA/KPIs, and automated processes.



55 team members
(8 automation-focused)



8 locations



1,500 users



900 data sources



140 bots
delivered to production

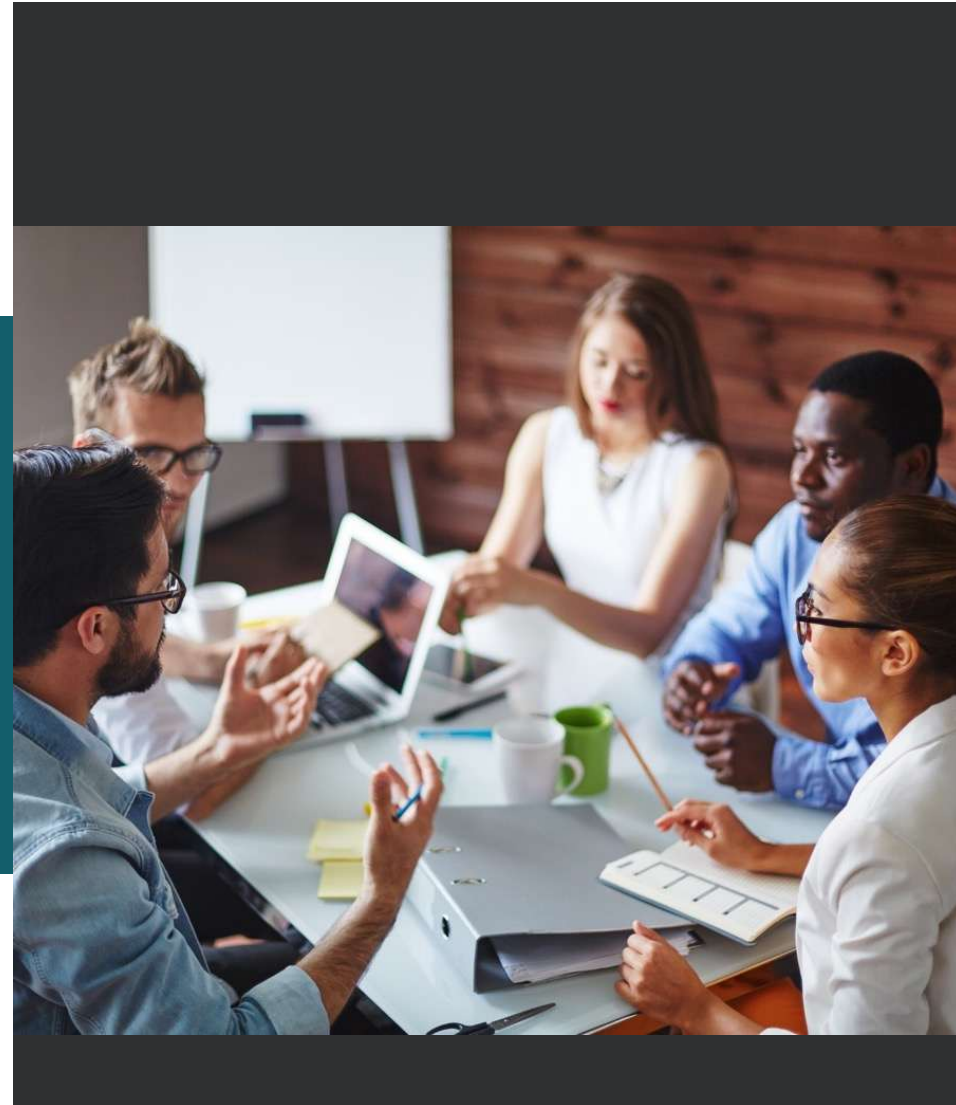


150K hours
automation projection for 2023

Technology and Data

Data and Analytics

While 48% of HR professionals feel confident their organization excels at generating and gathering people data, only 32% feel they can make constructive changes based on those insights.



Does your organization experience any of these challenges?

- A. Poor-quality data
- B. Focusing on the wrong metrics
- C. Creating data silos that prevent information-sharing
- D. Limited analytics expertise and capabilities
- E. Overreliance on historical data (vs. predictive analytics)

Success Factors for Data and Analytics Functions

Align Analytics with Business Strategy

Develop a **robust framework**

- Connect analytics with broader organizational goals
- Establish KPIs that drive measurable impact on business outcomes and demonstrate the value of initiatives

Cultivate a Data-driven Culture

Foster a culture that **prioritizes data-driven decision-making**

- Encourage professionals to leverage analytics in their strategies and daily operations

Democratize Access to Reports and Dashboards

Implement **user-friendly reporting tools and interactive dashboards**

- Empower staff and leaders to independently access and analyze data
- Promote transparency
- Foster a collaborative environment for data-driven decision-making

The Focus of Metrics/KPIs is Shifting from Reporting to Orchestration

Metrics are no longer just about measuring performance; they now drive automation, AI behavior, and human focus.

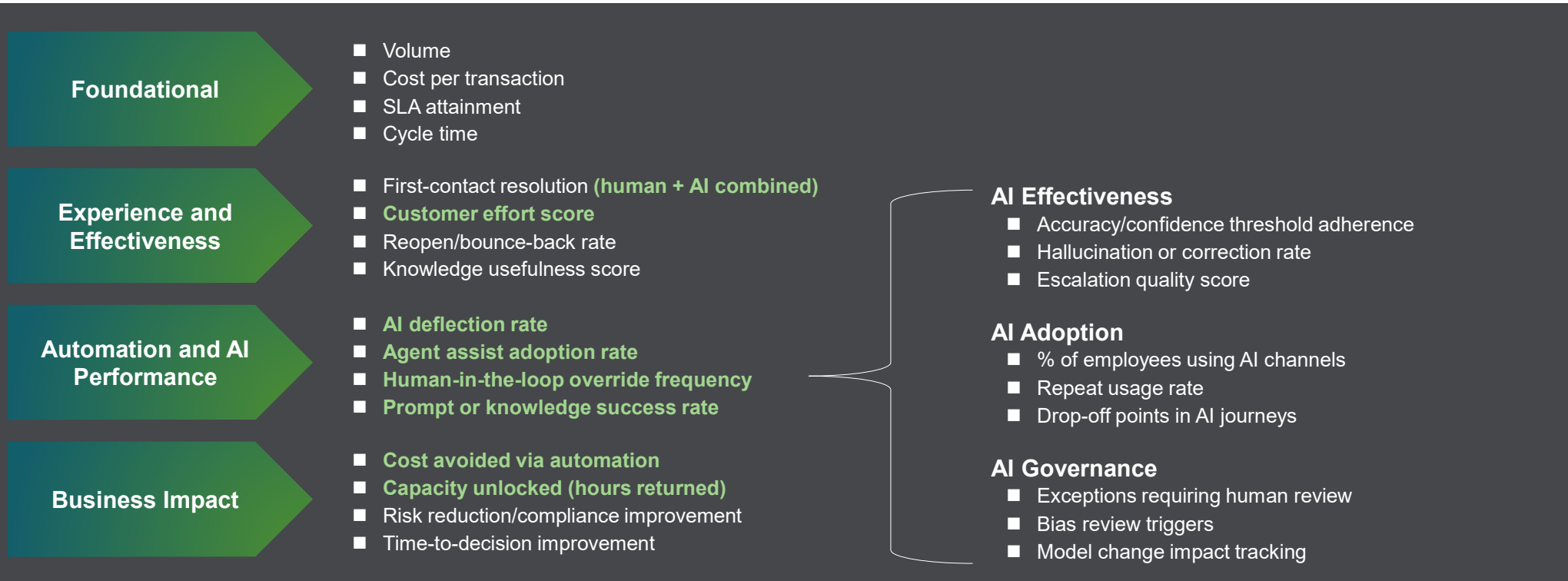
Operational control
(are we stable?)

Experience optimization
(are we easy to work with?)

Automation and AI steering
(what should machines vs. humans do?)

Strategic insight
(what should leadership decide?)

How Leading GBS Organizations Are Thinking about Metrics/KPIs



Performance against targets informs leaders how well the function is performing.

Dashboard Design Principles

Users have a great experience viewing dashboards, when the dashboards include the following attributes:



SIMPLE

- Clean and uncluttered
- Calculations defined and labels concise
- Visualizations highlight “key takeaways” (e.g., graphs, tables, icons)



RELEVANT

- Dashboards tailored by audience
- Metrics align with **strategic objectives** and operational goals
- **Context provided** on benchmarks, targets, etc.

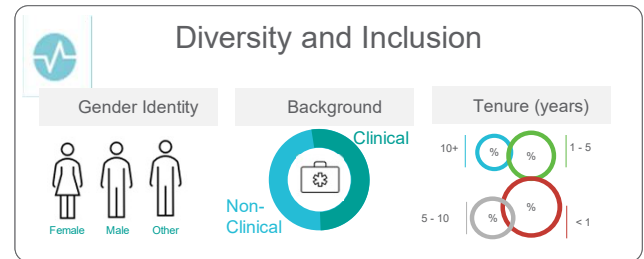
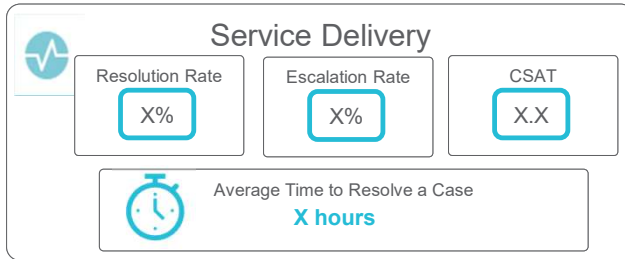
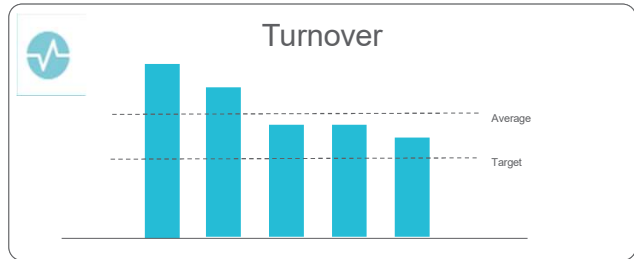
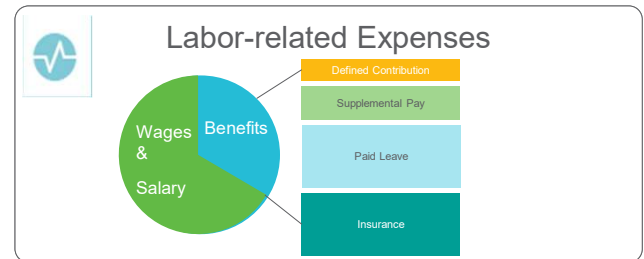
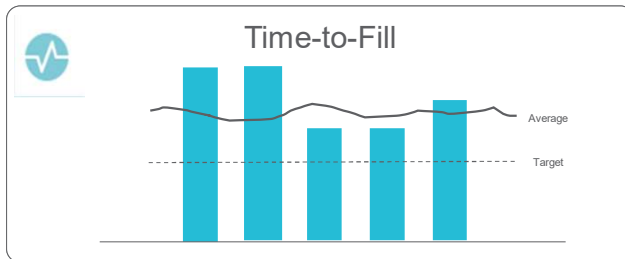
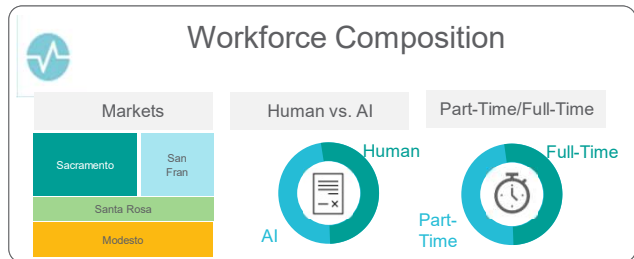


INTERACTIVE

- **Drill-down capabilities** enable investigation
- **Simple narratives** provide context, explanations, and/or recommendations
- **Interactivity balanced with simplicity**

Example – Executive Dashboard

Illustrative metrics that could shape an executive-level, on-demand dashboard.



Example – Executive Dashboard

Easy for executives to see key takeaways

Illustrative metrics that could shape an executive-level, on-demand dashboard

Executive Summary and Key Highlights

Headcount: X

Hires: X

Terms: X

Total Salary Expenses

\$XX M

Cost to Serve per Employee

Engagement Score

Workforce Composition

Markets: Sacramento, Santa Rosa, Modesto, San Fran

Contract / Employee: Contract (Employee icon), Part-Time (Full-Time icon)

Time-to-Fill

Labor-related Expenses

Turnover

Service Delivery

Resolution Rate: X%

Escalation Rate: X%

CSAT: X.X

Average Time to Resolve a Case: X hours

Diversity and Inclusion

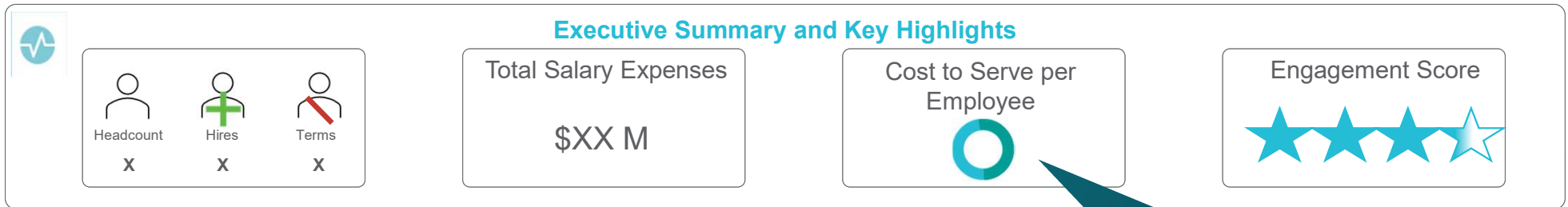
Gender Identity: Female, Male, Other

Background: Clinical, Non-Clinical

Tenure (years): 10+, 5-10, 1-5, <1

Example – Executive Dashboard

Illustrative metrics that could shape an executive-level, on-demand dashboard.



↑ **Cost-to-Serve** driven by Tier 1 demand growth → *Expand Tier 0 automation and knowledge*



Example – Executive Dashboard

Illustrative metrics that could shape an executive-level, on-demand dashboard.



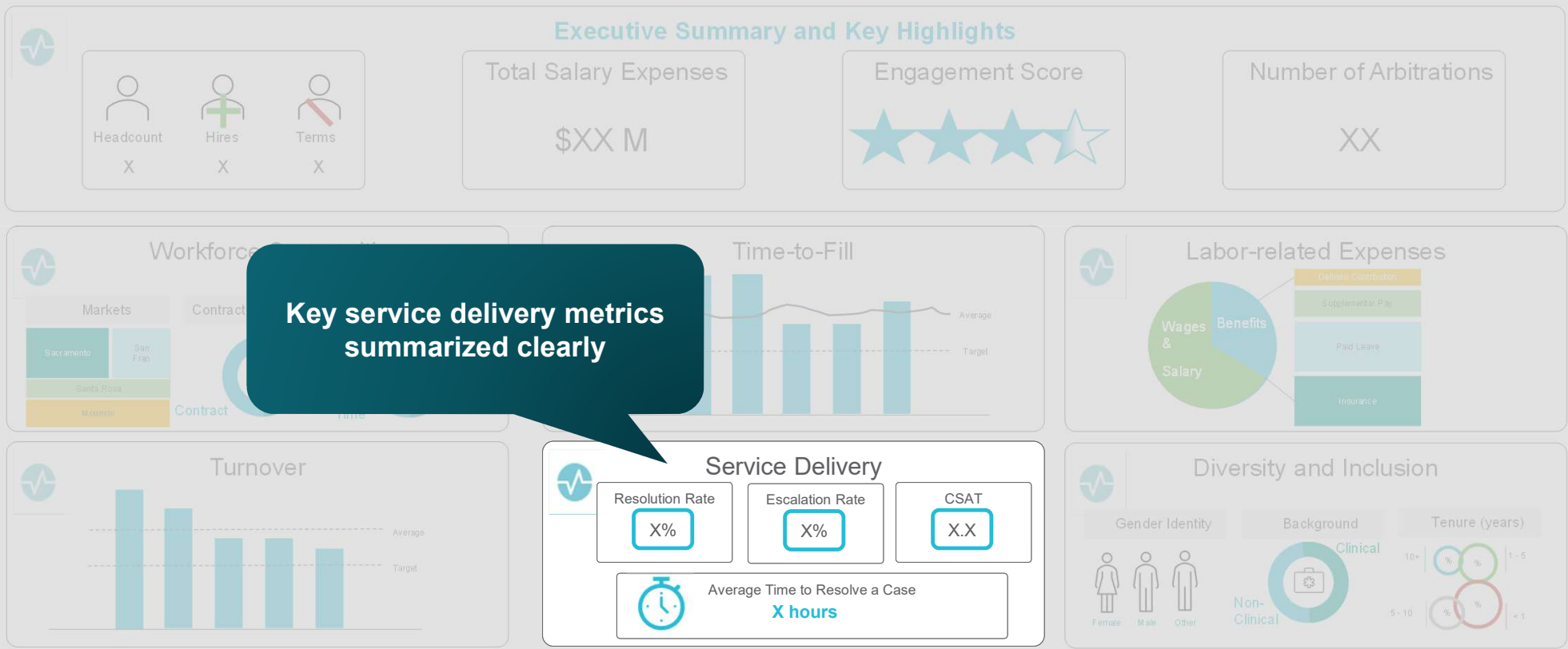
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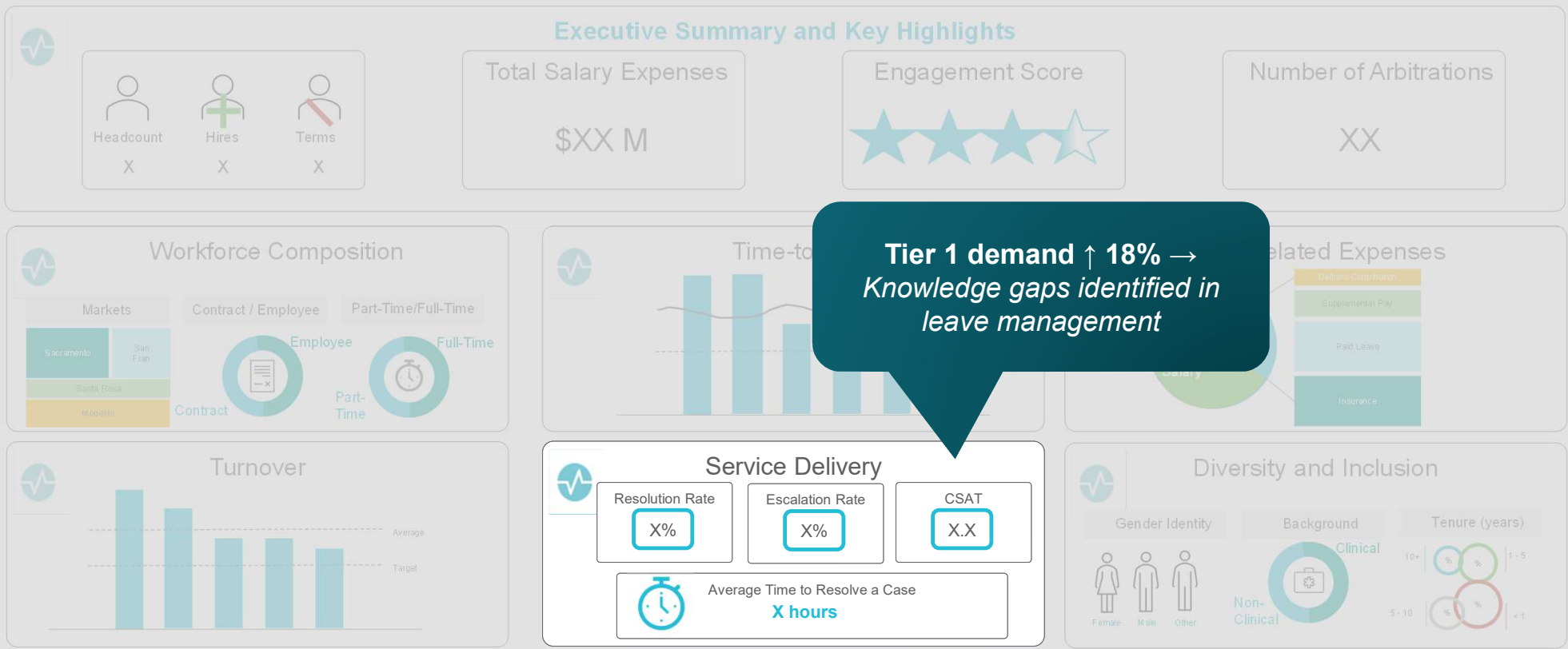
Example – Executive Dashboard

Illustrative metrics that could shape an executive-level, on-demand dashboard.



Example – Executive Dashboard

Illustrative metrics that could shape an executive-level, on-demand dashboard.



What's Next? ... Here's Five Things to Do

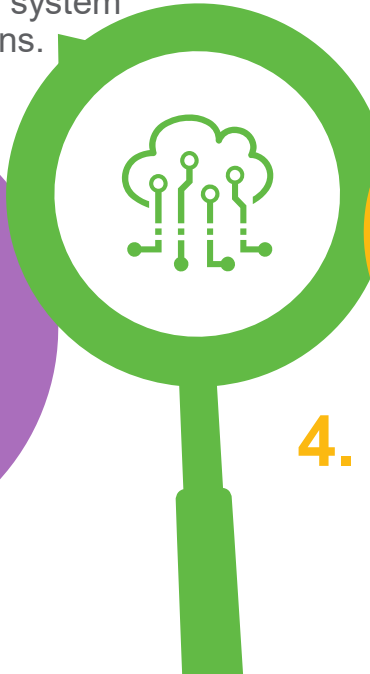
1. Revamp your shared services strategy. Is there an opportunity in this climate to leverage your shared services operations as a catalyst for scale?



2. Focus on innovations to shared services that enable efficiency, agility, and scale—all while maintaining or improving customer service.



3. Consider the impact of technology to major decisions, including your expansion strategy, service delivery model, BPO contracts, and system implementations.



5. Consider ScottMadden and our SSO Accelerator tool for an assessment that will generate recommendations to boost the value of your shared services organization.



4. Create an inclusion strategy that builds a strong corporate culture and improves employee engagement.



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: Finding the Value: How a GBS Strategy Set the Path for Global Scale and Digital Evolution

- Speaker: Vantive
- Tuesday, March 17 at 2:30-3:00 PM

STOP BY SCOTTMADDEN'S BOOTH

- Drop a card to gain access to shared services insights and helpful resources

ACCESS OUR WORKSHOP DECK

- Fill out the form on this page to download a PDF of our workshop deck



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

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