



# Designing Shared Services for Scale, Agility, and Future Value

# YOUR DISCUSSION LEADS



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# Introduction to ScottMadden



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

**Smart. Focused. Done Right.®**

# Solutions that Impact Today and Shape Tomorrow

We bridge the gap between **"what if"** and **"what is"** with a broad array of consulting services. By pairing deep sector experience with a proactive approach, we ensure your organizational transformation delivers long-term, functional value.

## Business Transformation and Shared Services



### Functional Assessments and Planning



### Operational Effectiveness and Improvement

## IT, Digital, and AI Solutions



### Strategy Development and Implementation

## Designed For Impact, Not Overhead



We maintain the muscle required for **large-scale, enterprise-wide transitions**, while ensuring every project is anchored by senior-level experience

### Staffing Model



Our **embedded partner** structure means greater expertise on your team



### 16-year average partner tenure with the firm

Reliable experts you can trust to handle massive complexity with a fierce grip on the details



### Tailored solutions from optimally structured teams

Agile and efficient teams appropriately staffed to make a lasting impact

# Corporate & Shared Services (C&SS) Focus Areas



## BUSINESS SUPPORT SERVICES

We help **improve service response by integrating administrative functions** into shared services models—including real estate, facility maintenance, fleet, security, sales and marketing, insurance, customer service, research, and more.



## FINANCE AND ACCOUNTING

**Transforming finance and accounting operations**, we help companies with enterprise financial business services, strategic centers of expertise, intelligent automation solutions, hybrid insource/outsource delivery models.



## HUMAN CAPITAL MANAGEMENT

We offer **HR transformation** (including HR shared services), analytics, HR systems (selection, implementation, and optimization), process design and continuous improvement, talent and employee engagement strategy and programs, and payroll.



## 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 for real business outcomes**.



## MULTIFUNCTION SHARED SERVICES/GLOBAL BUSINESS SERVICES (GBS)

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



## SUPPLY CHAIN

We assist clients across the full range of supply chain processes, **creating alignment with stakeholders**. From crafting new supply chain strategies to restructuring your organization to improving your daily operations, we help you with every step.

## Purpose-Driven. Results-Focused.

Anyone can **dream** about transformation, but we work alongside you to make it a reality. **Real progress. Real-world results.**

**We help you build what lasts and for what's next.**



### Proven Experts

Seasoned consultants with relevant, practical experience at every level



### Tailored Action

An approach designed for your specific needs, not a prescribed way of doing things



### Dedicated Solutions

A passion for the work that pushes us to dig deeper and unlock greater value



## Some of the Clients We Serve Across Industries

| Retail and Consumer Products                                                        | Manufacturing and Industrial                                                                            | Technology and Communications                                                        | Higher Ed., Public Sector, Non-profit                                                                                                              | Energy and Utilities                                                                                 | Healthcare                                                                                                                                   | Professional Services                                                                                                     |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
|    |                        |    |                                                                 |                   |                                                           |                                        |
|    |                        |    | <br>West Virginia University                                    |                   |                                                           |                                        |
|    |                        |    | <br>EMORY UNIVERSITY                                            |                   | <br>AmeriHealth Caritas<br>Care is the heart of our work. | <br>Entrada Group<br>Mexico, Delivered |
|    |                        |    | <br>AH ANIMAL HEALTH INSTITUTE                                  |                   | <br>HCA Healthcare™                                       |                                        |
|    | <br>Georgia-Pacific    |    | <br>THE BOARD OF PENSIONS OF THE PRESBYTERIAN CHURCH (U.S.A.) | <br>DUKE ENERGY® | <br>Kettering HEALTH                                     | <br>randstad                          |
|   | <br>IR Ingersoll Rand |  | <br>UTA<br>THE UNIVERSITY OF TEXAS AT ARLINGTON               | <br>exelon™     | <br>Penn Medicine                                       | <br>RELIAS                           |
|  | <br>MASONITE.        |  |                                                                                                                                                    |                 | <br>SSMHealth                                           | <br>R Russell Reynolds ASSOCIATES    |

# How We Partner With You

**We don't consult from the sidelines.** Our partner-led teams act as an extension of your own to solve complex transitions with tenacity and transparency.

## Seamless Integration

## Proactive Advocacy

## Sustainable Impact



**Extension of Your Team:** We work side-by-side with your people, learning your culture and operational nuances to ensure our solutions are tailored to your organization

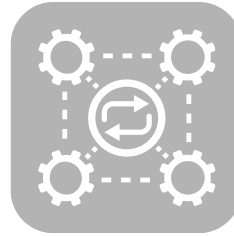
**Direct Engagement:** From the C-suite to the field, we engage at every level of the organization to build alignment and buy-in

**In Your Corner:** We act as a proactive partner, anticipating hurdles and identifying risks before they impact the project

**Tenacious Problem Solving:** We bring "forward-thinking tenacity" to every engagement, maintaining focus on the desired outcome even as transitions become increasingly complex

**Driving Ownership:** We prioritize knowledge transfer, so your team is equipped to manage the solution long-term

**Lasting, Tangible Impact:** We focus on ensuring your internal stakeholders have the tools and training to maintain momentum and realize measurable value



# Shared Services Overview



## What Is Shared Services

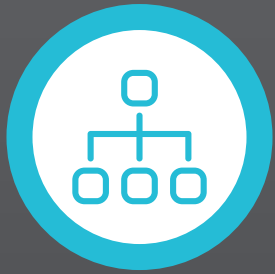
**SHARED SERVICES IS**  
*WHEN A BUSINESS*  
 **CONSOLIDATES**  
ITS SUPPORT FUNCTIONS  
TO BETTER SERVE  
 **CORPORATION**  
 **AND ITS BUSINESS**  
 **UNITS, OPERATING**

**AS A**  
**BUSINESS**  
*WITHIN A BUSINESS,*  
UTILIZING A WELL DEFINED  
**INFRASTRUCTURE**  
*TO ENABLE HIGHER VALUE*



**SERVICE DELIVERY.**

# 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 Delivery and Transparency

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

## Gain Control and Leverage Data

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



## Cost Control and Scalability

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

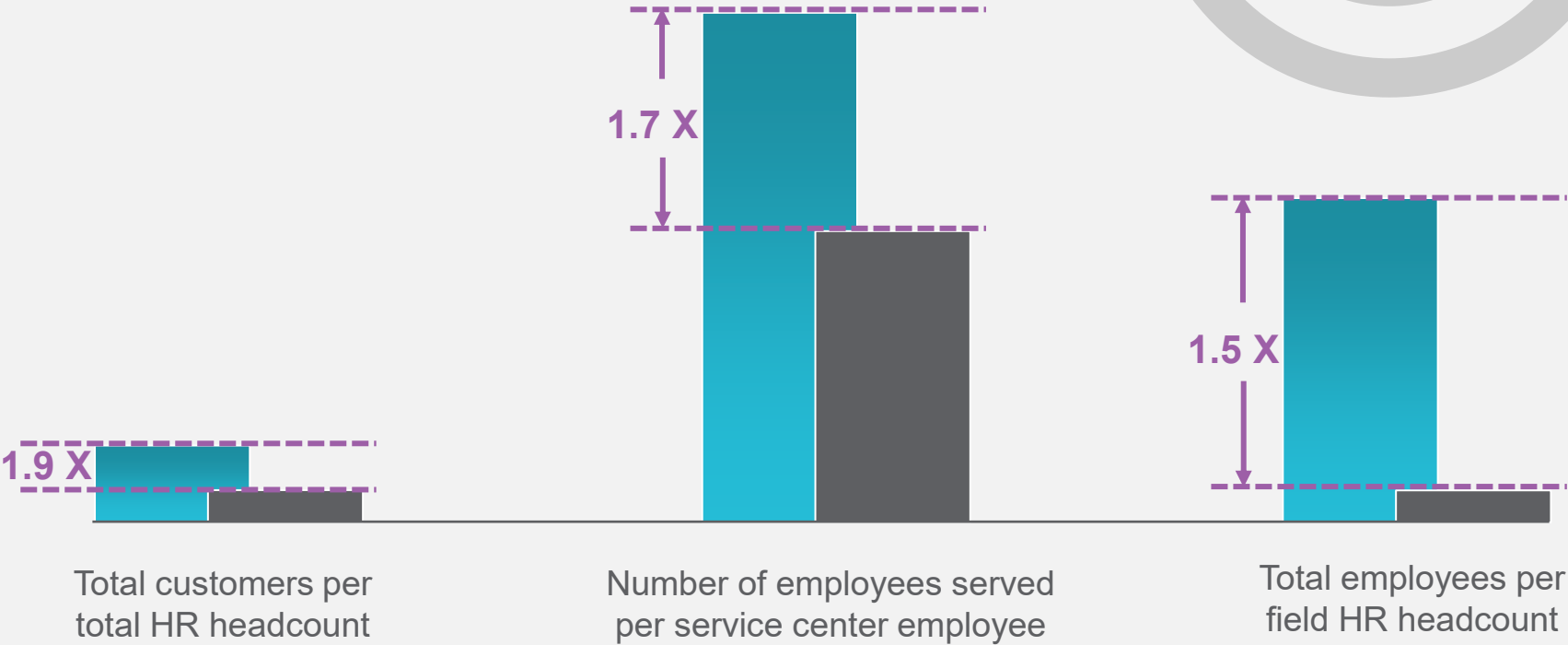
## End-to-End Accountability

- 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, including their employee service centers.

HR Staffing Comparisons  
Top-Performer Group vs. Comparison Group



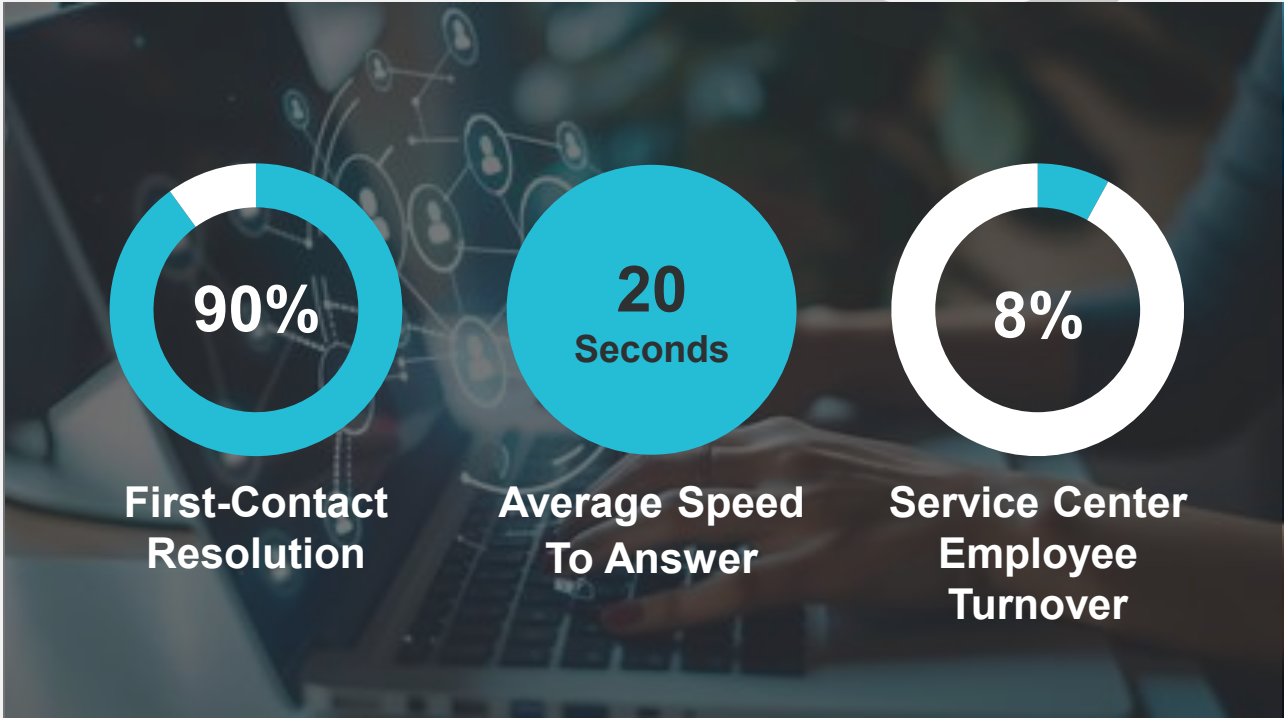
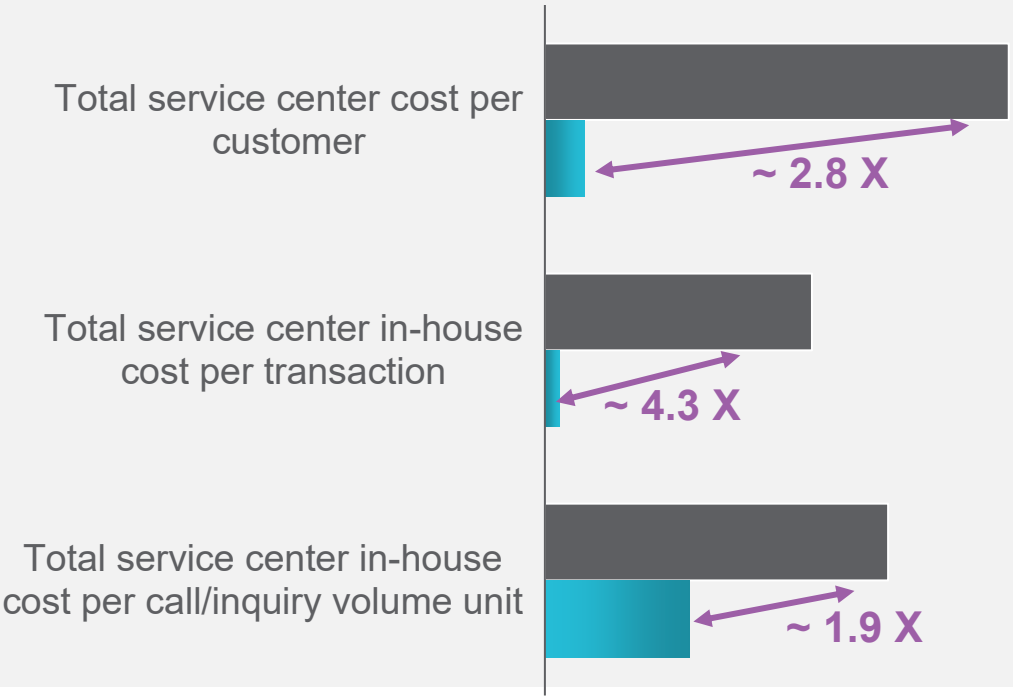
# Benefits of Shared Services – HR Benchmarks (Cont'd)



Top-performing service centers operate at a large cost advantage and show better operational performance.

## Service Center Cost Comparison

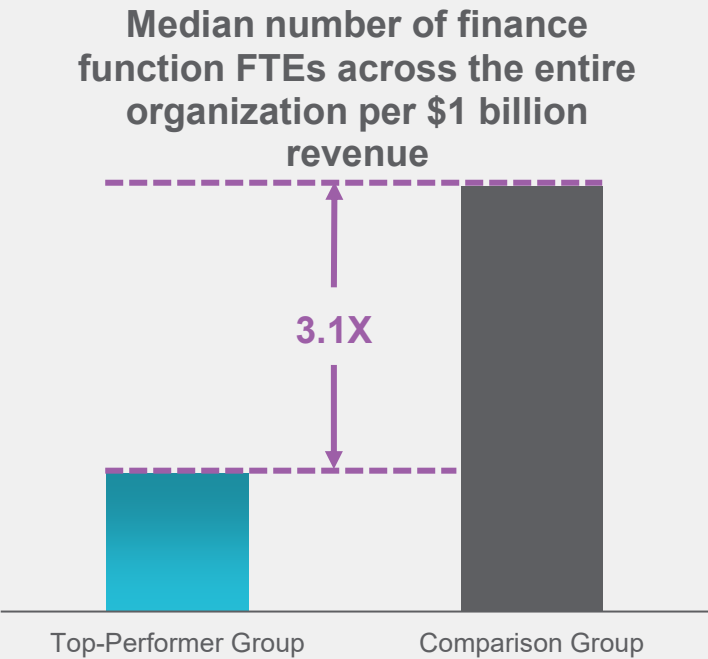
Top-Performer Group vs. Comparison Group



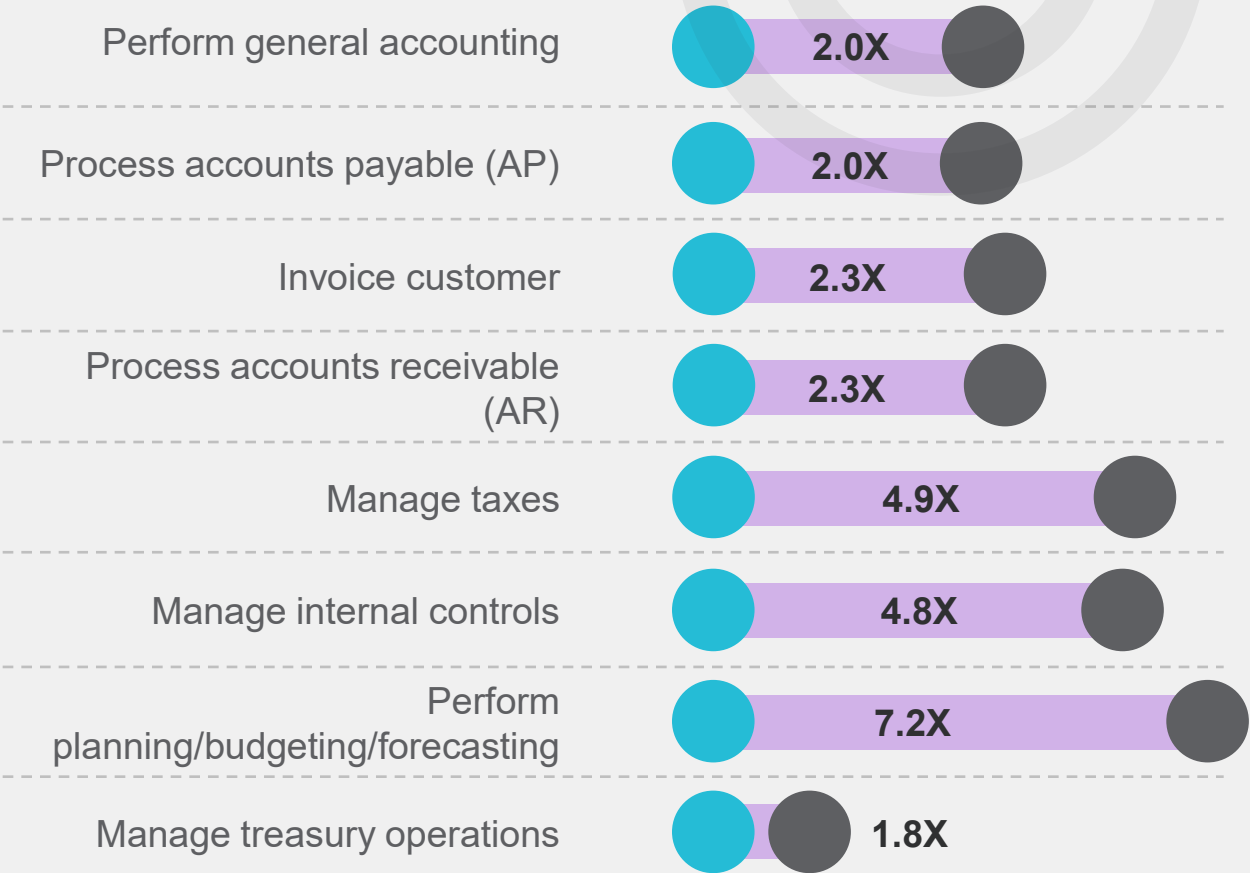
# Benefits of Shared Services – Finance Benchmarks

Top-performing finance shared services centers have significantly better staffing ratios

- 3.1X more efficient overall
- Typically, 2-7X more efficient in staffing major finance processes



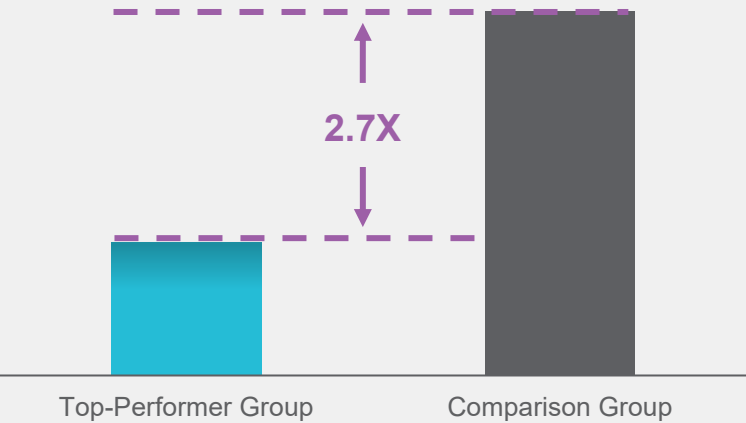
Median number of FTEs that perform the following processes per \$1 billion revenue



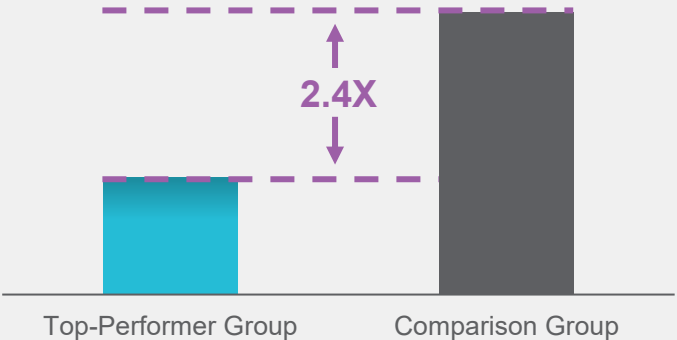
# Benefits of Shared Services – Finance Benchmarks (Cont'd)

Top-performing organizations operate at a larger cost advantage for finance overall, as well as in their finance SSCs.

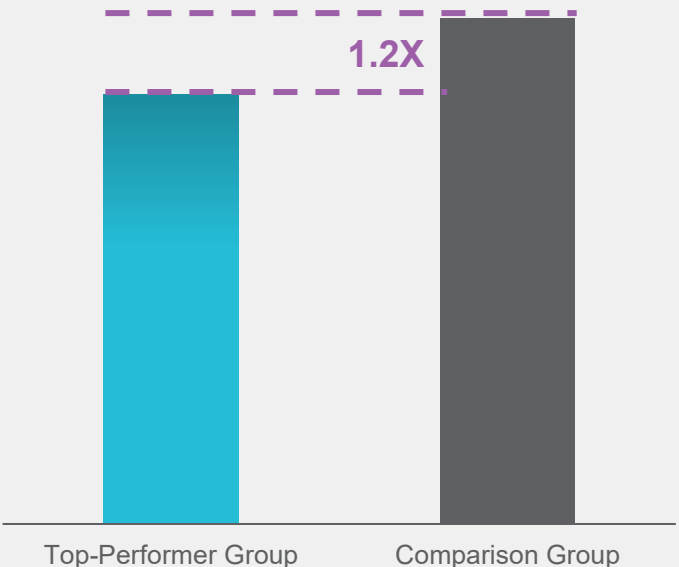
Total cost to perform the finance function per \$1,000 revenue



Total cost to operate the finance shared services center(s) per \$1,000 revenue



Total cost to operate the finance shared services center(s) per finance shared services center employee

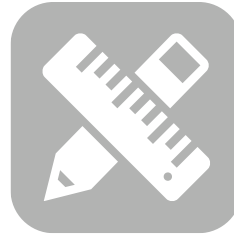


# Benefits of Shared Services – Non-Labor Savings

| Category                                                                                                 | Savings Type                                                                                                                                                                                               | Example Range of Benefits |
|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
|  <b>Finance</b>         | <ul style="list-style-type: none"> <li>Audit fee reduction</li> <li>T&amp;E expense savings</li> <li>Dynamic discounting savings</li> <li>Working capital improvement</li> </ul>                           | \$100K – \$3M             |
|  <b>HR</b>              | <ul style="list-style-type: none"> <li>Recruiting cost avoidance</li> <li>Training cost reduction</li> <li>Unemployment insurance liability avoidance</li> </ul>                                           | \$50K – \$2M              |
|  <b>Administrative</b> | <ul style="list-style-type: none"> <li>Facility and utility cost reduction</li> <li>Office supply/mailing cost reduction</li> <li>Commuter services reduction</li> <li>Travel expense reduction</li> </ul> | \$40K – \$3M              |
|  <b>Other</b>         | <ul style="list-style-type: none"> <li>Legal fee reduction</li> <li>Economic incentives</li> </ul>                                                                                                         | \$60K – \$600K            |

## ADDITIONAL SOFT-DOLLAR SAVINGS AND QUALITATIVE BENEFITS INCLUDE THESE ITEMS:

- ✓ Reduced turnover
- ✓ Reduced cycle times
- ✓ Improved customer satisfaction
- ✓ Reduced risk
- ✓ Better compliance
- ✓ Improved scalability
- ✓ More flexibility
- ✓ Faster decisions
- ✓ Improved internal controls
- ✓ Reduced time to fill jobs
- ✓ Transaction error reduction



# **Shared Services Fundamentals: Design and Implementation**



# The Journey to Implementation

## Approach to Shared Services Implementation & Optimization

1

### Understanding The Current State

- Thoroughly understand and document current state processes
- Challenge be-spoke processes and manual work-arounds
- Identify improvement opportunities and deviation from leading and standard practices

2

### Designing The Future State

- Now is the time to take a hard look at how to best leverage AI and how it can fundamentally change your delivery model vs seeking out point “quick fix” solutions
- Any work done now to change policies or processes aimed at the improvement of data quality will facilitate adoption of AI and other automation technologies

3

### Building The Case For Change

- Define the enterprise value and understand the full investment
- Provide confidence of when benefits will materialize and how they will be captured
- Create a compelling case for leveraging AI as a strategy for change

4

### Developing a Roadmap and Plan for Implementation

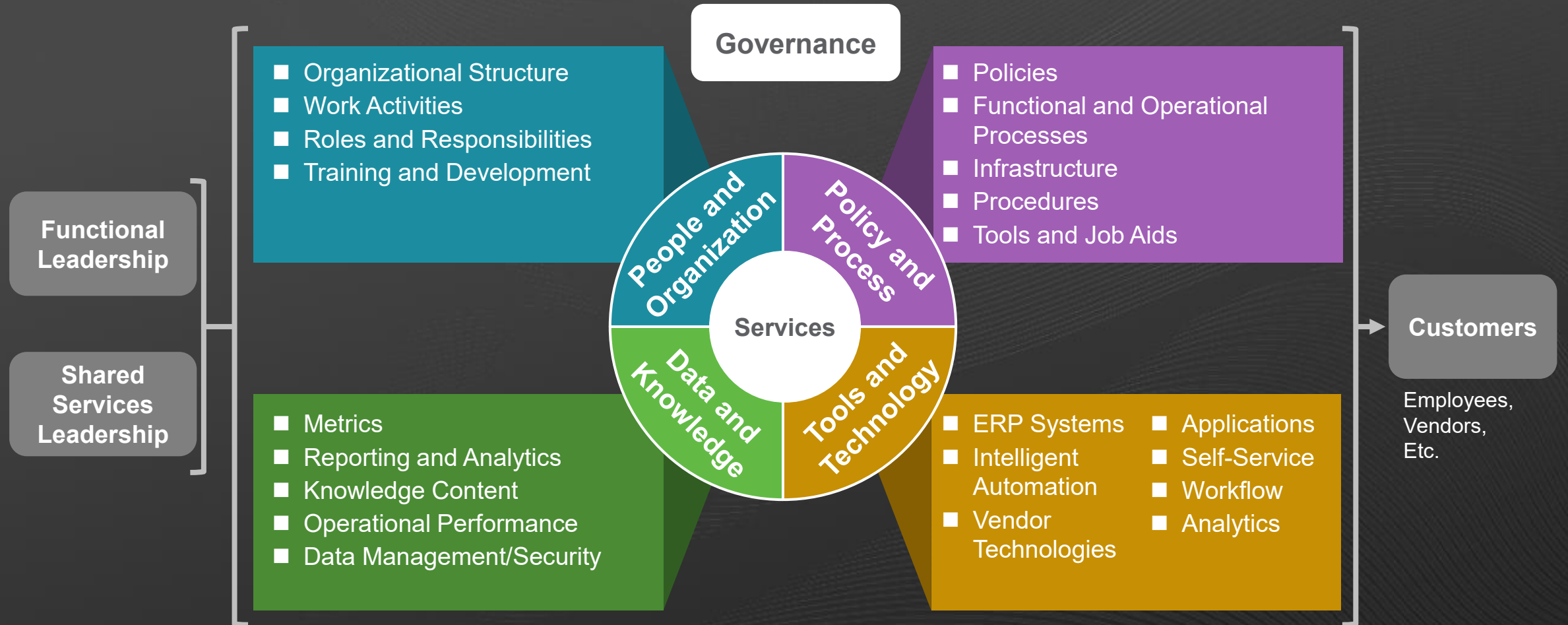
- Properly size and prioritize implementation of solutions to maximize benefit and effectively manage resource needs
- Resource planning is critical - You’ll need to “keep the lights on” while dedicating your best and brightest talent to the implementation project. Having a plan to free up those resources is critical



# Understanding the Current State



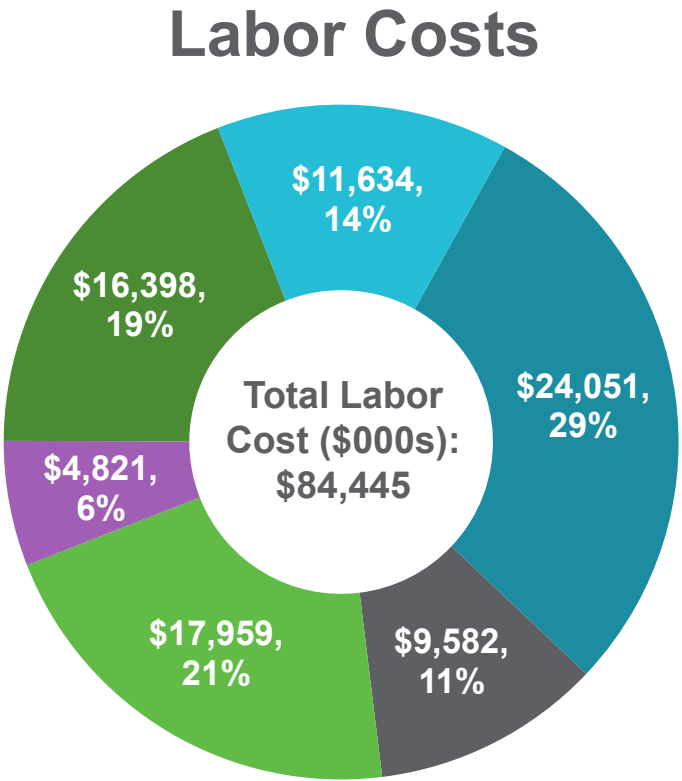
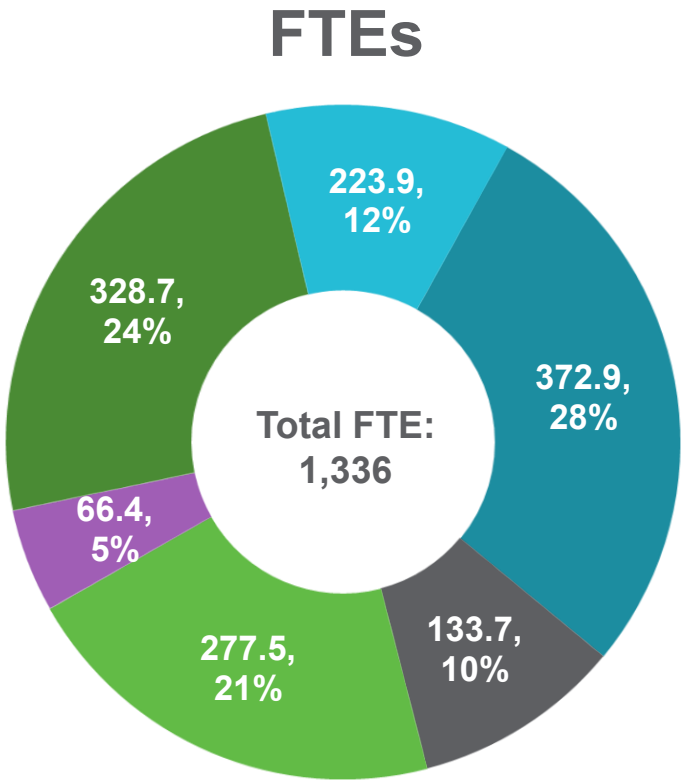
# Assessment: Understanding the Current Operations



# Determine Activities and Costs



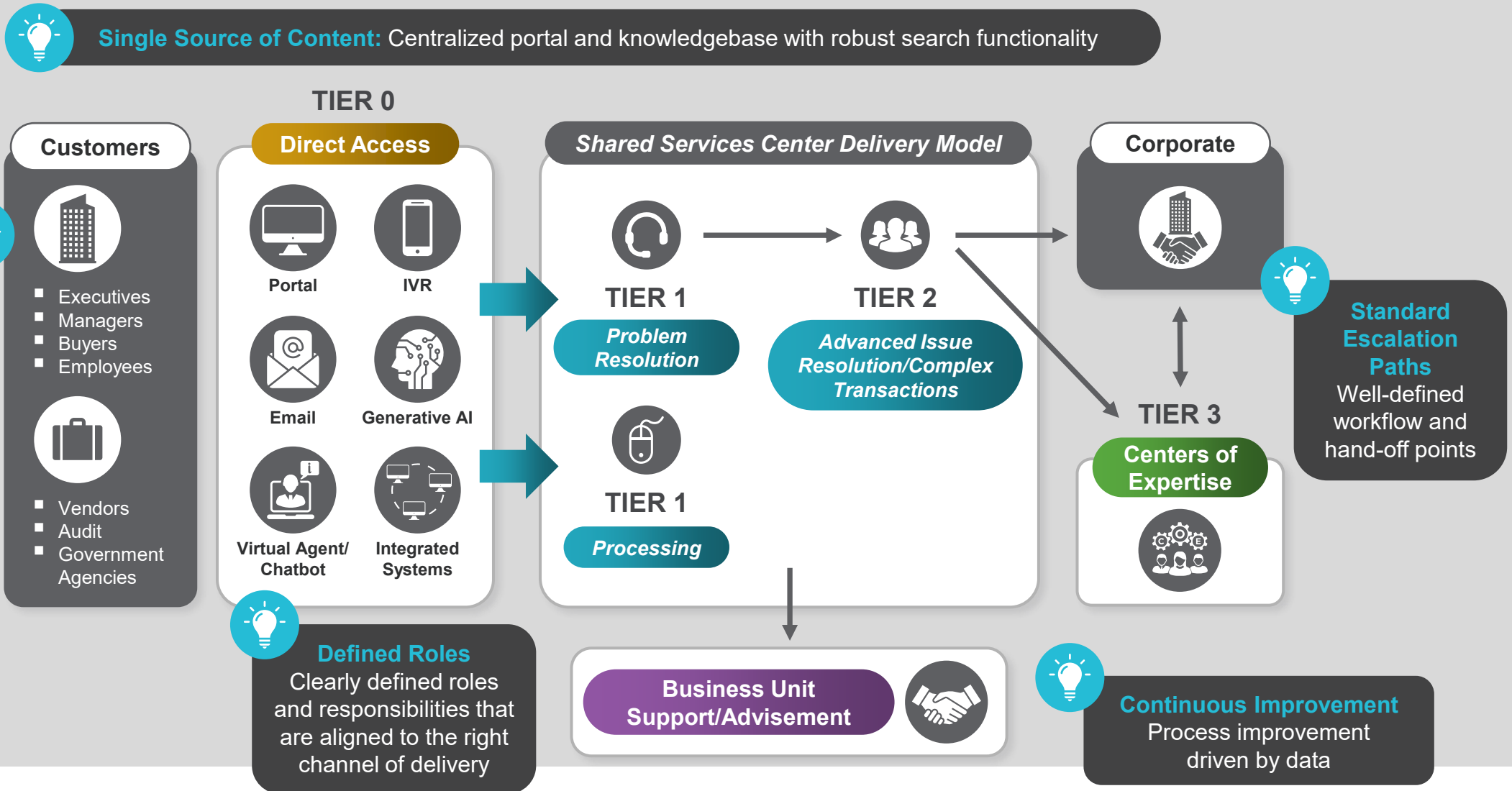
Our Work Intelligence Blueprint can be an effective tool to understand **time spent on, and cost of, activities**. It can also help identify process challenges.



Key

- Financial Services
- Communications & Event Planning
- General Admin
- Contracts & Grants Management
- Facilities
- Human Resources

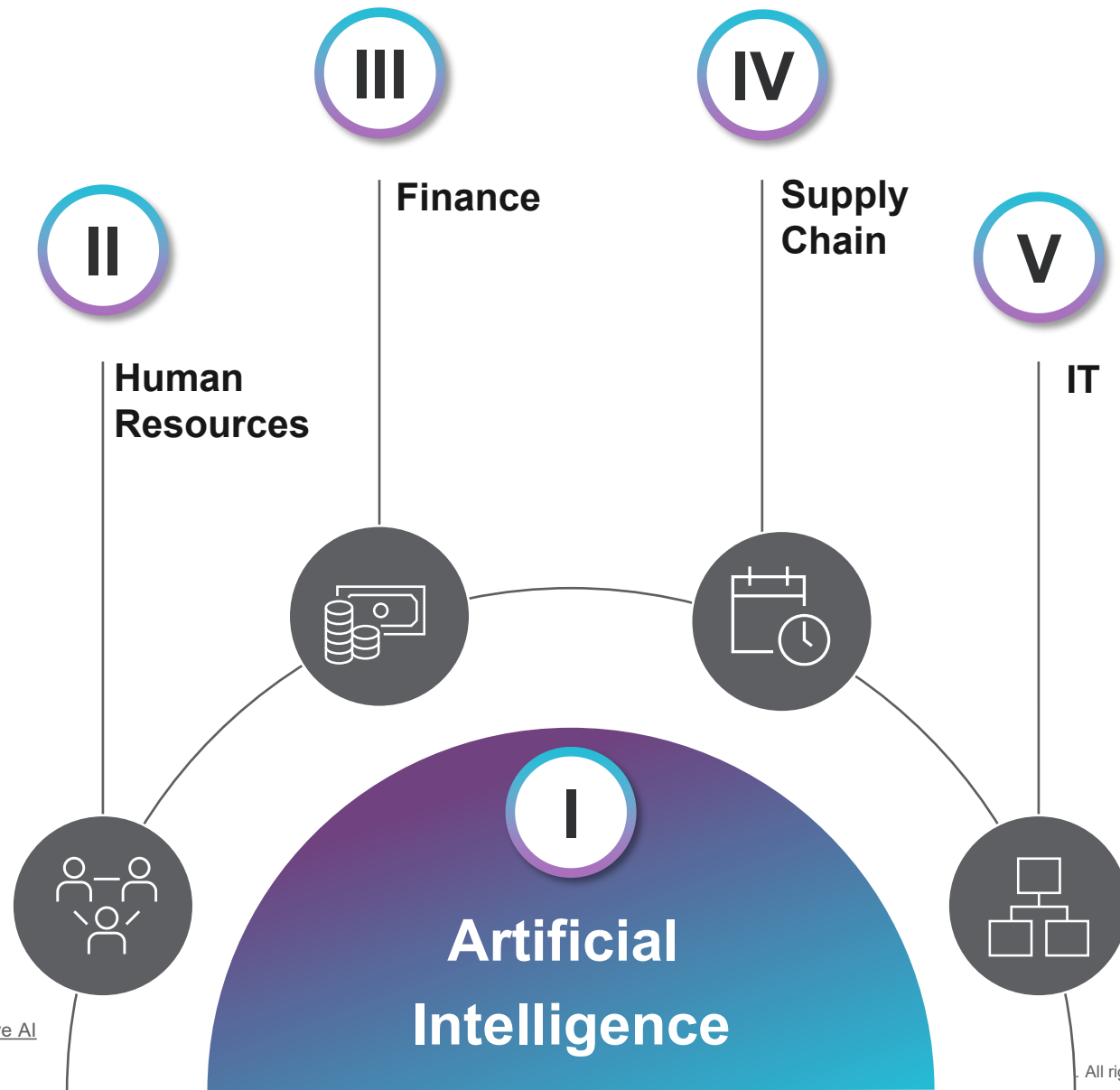
# Traditional Operating Model



# Artificial Intelligence Enables the Data to Optimize Shared Services

Artificial intelligence (AI) is crucial for shared services organizations and the enterprise governance of AI should be included in the SSO.

- **Efficiency and Productivity:** AI automates repetitive tasks, freeing up employees to focus on higher-value activities
- **Improved Customer Service:** AI-powered chatbots handle routine inquiries, enhancing the customer experience
- **Cost Reduction:** AI streamlines processes, reducing operational costs and boosting competitiveness
- **Personalization:** AI generates personalized content and recommendations for customers
- **Innovation Potential:** AI, including generative AI, can revolutionize service delivery and decision-making



# AI Is More Than Automation... It's Digital Labor

*Organizations are shifting from augmenting tasks to **redesigning how work gets done** at a fundamental level, including **who (or what) is doing the work, how, when, and why.***

## WHAT'S ALREADY CHANGING



### **From tools to agents**

*Moving beyond copilots and prompts toward autonomous orchestration*



### **From silos to new operating models**

*Transitioning from isolated efficiency to new structures, workflows, and service delivery*



### **From tasks to judgement work**

*Increasingly handling coordination, decision support, and exception management*

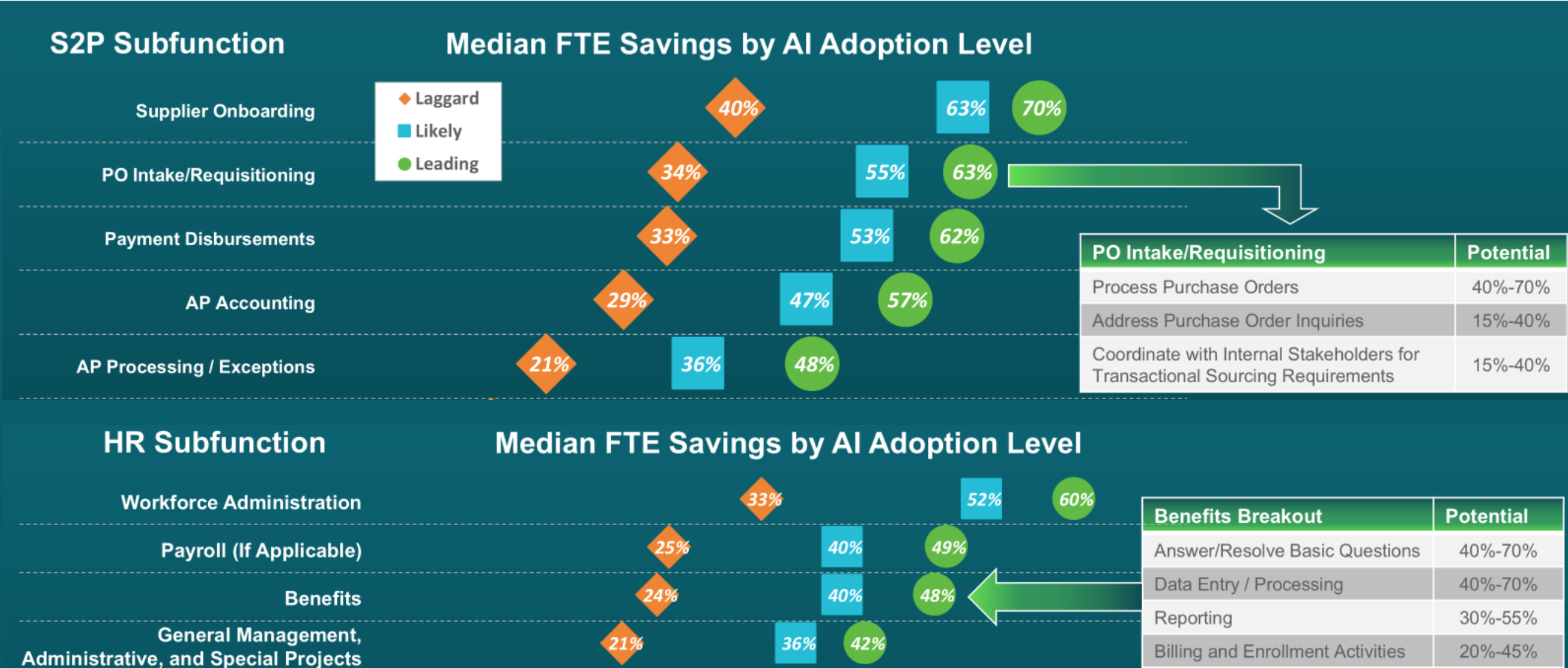


### **From human-only to hybrid labor mix**

*Combining people, AI agents, workflows, and orchestration platforms*

# Consider the Impact of AI to Process Efficiency

Based on ScottMadden data, leveraging AI can improve process efficiency by as much as 70%, depending on the specific process being implemented.





# Designing the Future State

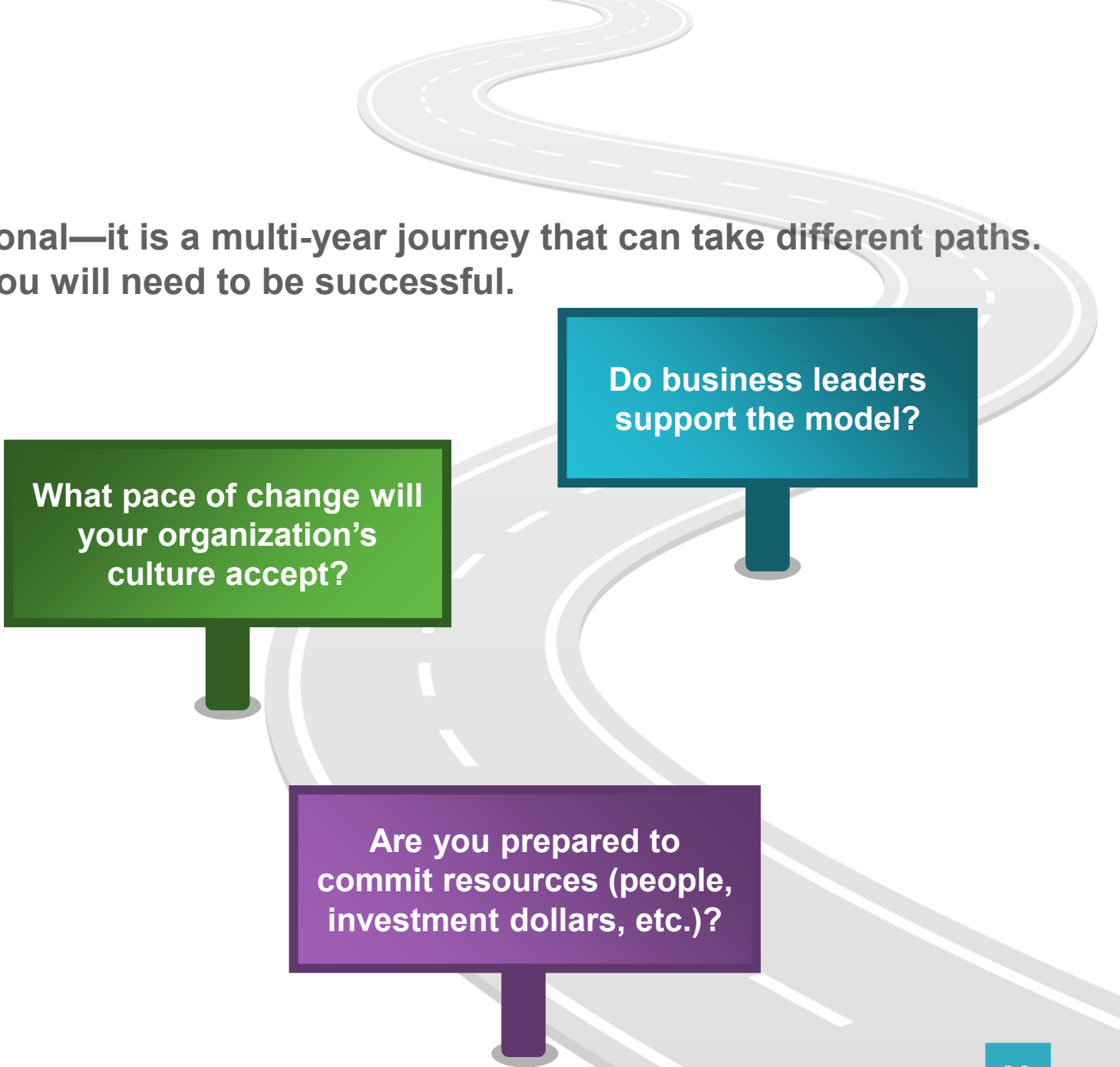


## The Path Forward

The shared services journey is transformational—it is a multi-year journey that can take different paths. Consider key challenges and the enablers you will need to be successful.



Approach in  
“digestible” steps  
for your  
organization—  
determine how far,  
how fast.



What pace of change will  
your organization's  
culture accept?

Do business leaders  
support the model?

Are you prepared to  
commit resources (people,  
investment dollars, etc.)?

## Where Do You Go From Here?

Regardless of maturity level, sustained success requires continuous improvement—because standing still means falling behind.

While all of these are an important part of your maturity journey, today we will focus on the implications of deploying AI to your operating and delivery models.



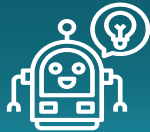
**Geographic or  
Business Unit  
Expansion**

*Are there countries or regions that are still outside the SSC organization that could now be incorporated?*



**Services  
Expansion**

*Are there additional functions or higher value services that can be added to your offerings catalog?*



**Increased  
Automation**

*Is technology being fully leveraged to maximize efficiency and effectiveness via automation?*



**Process/Policy  
Harmonization**

*Are there process or policy exceptions that can be revisited and standardized?*



**End to End  
Ownership**

*Are there subprocesses that were originally left behind that now can be incorporated to create end to end ownership?*



**Captive or  
Outsourced  
Offshoring**

*Are there **stable**, mature processes that now would be good candidates for either outsourcing or captive offshoring/nearshoring?*

**Whether you are implementing a brand-new shared services center, expending your operations, or implementing automation technologies (like AI), NOW is the time to revisit your operating and service delivery model**

## Level Setting on Terminology

### Operating Model

*Translates strategy into action*

An operating model describes **how an entire function is structured to deliver value** in alignment with strategy. It's the blueprint for how work is organized and completed

*It answers questions such as:*

- How is authority and accountability structured?
- How are key decisions made and executed?
- What processes, technology, and capabilities are required to achieve strategic priorities?
- How does the function integrate with enterprise strategy and other functions?

### Service Delivery Model

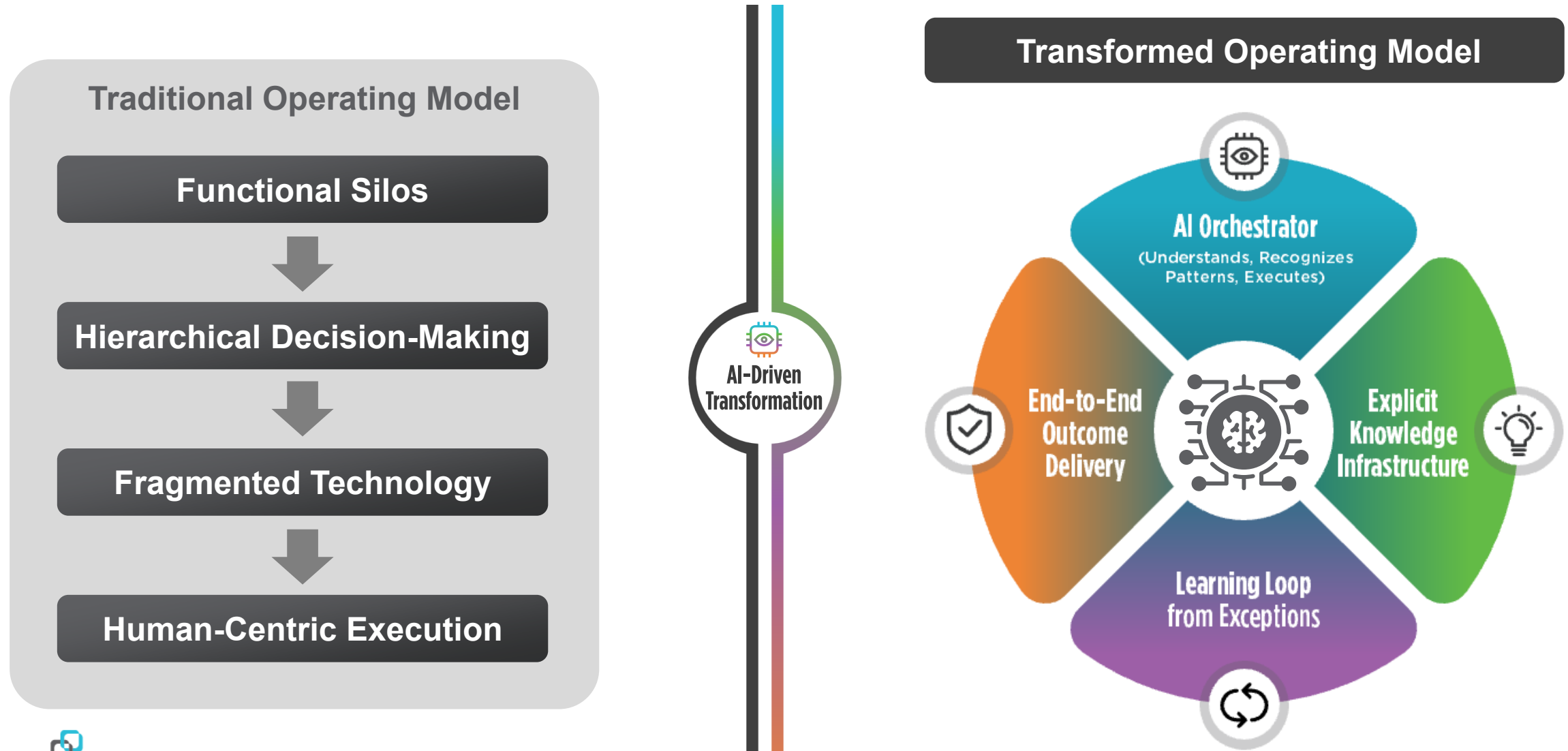
*The “how” of execution*

A service delivery model is a **component within the operating model** that focuses specifically on **how services are delivered**—who does what, where, and how

*It defines things like:*

- Centralized services and/or field support
- Outsourced or third-party delivery arrangements
- Delivery layers (e.g., self-service, digital labor, generalists, specialists)
- Service level agreements, charge-back models, and prioritization of delivery work

# Operating Model Transformation



# Enterprise Maturity Curve – Redefined by AI

The organizations creating value are redesigning workflows and operating models – not just deploying AI tools

Realized Value, Effectiveness & Maturity

## Automation



Rules-based task execution with RPA, scripts, etc.

## AI Assistance



Human augmentation with drafting, summarization, and decision support

## Agentic Workflows



Workflow orchestration with AI agents performing multi-step execution, cross-system actions, and decision routing

## Digital Labor Model



Operating model redesign that creates a hybrid enterprise with human + AI teams, dynamic orchestration, and outcome-based operations

# Three Tangible Implications of New Operating Models



## Flatter but more skilled organizational structures

*Digital labor replaces execution-centric headcount. The team that remains leverages judgement, subject matter expertise, business acumen, etc. to drive end-to-end outcome delivery.*

***Smaller models don't necessarily mean cheaper models.***



## Digital labor as a key member of every team

*Digital labor goes beyond task and/or transaction execution and plays a role in functional analyses, judgement decisions, cross-functional data flows, etc. (i.e., knowledge work)*

***Digital labor orchestration happens within teams and also across functional boundaries.***



## Increasing criticality of foundational elements

*Data quality, embedded governance, and technology investment are table stakes for the transformed model. While these can begin as function-specific efforts, eventual enterprise-wide integration is required.*

***Data does not need to be perfect Day 1, but data quality will limit transformation depth.***

# Moving from Operating Model to Service Delivery

A service delivery model is a **component of the operating model** focused on **how services are delivered**—who does what, where, and how.

## EARLY SERVICE DELIVERY QUESTIONS TO ANSWER



**How will we deliver services in the future**—through a centralized, federated, or hybrid model?



**What role will each delivery layer play**—and are there phasing opportunities to drive near-term progress?



**What delivery layers will we use**—self-service, functional SMEs, customer-facing AI agents, or function-specific digital labor?



How will we **measure operational performance** and **customer success**?

# AI Is Fundamentally Changing the Service Delivery Model



**Unified AI Intake**  
One front door  
Personalization ↑  
Access ↑ · Resolution ↑



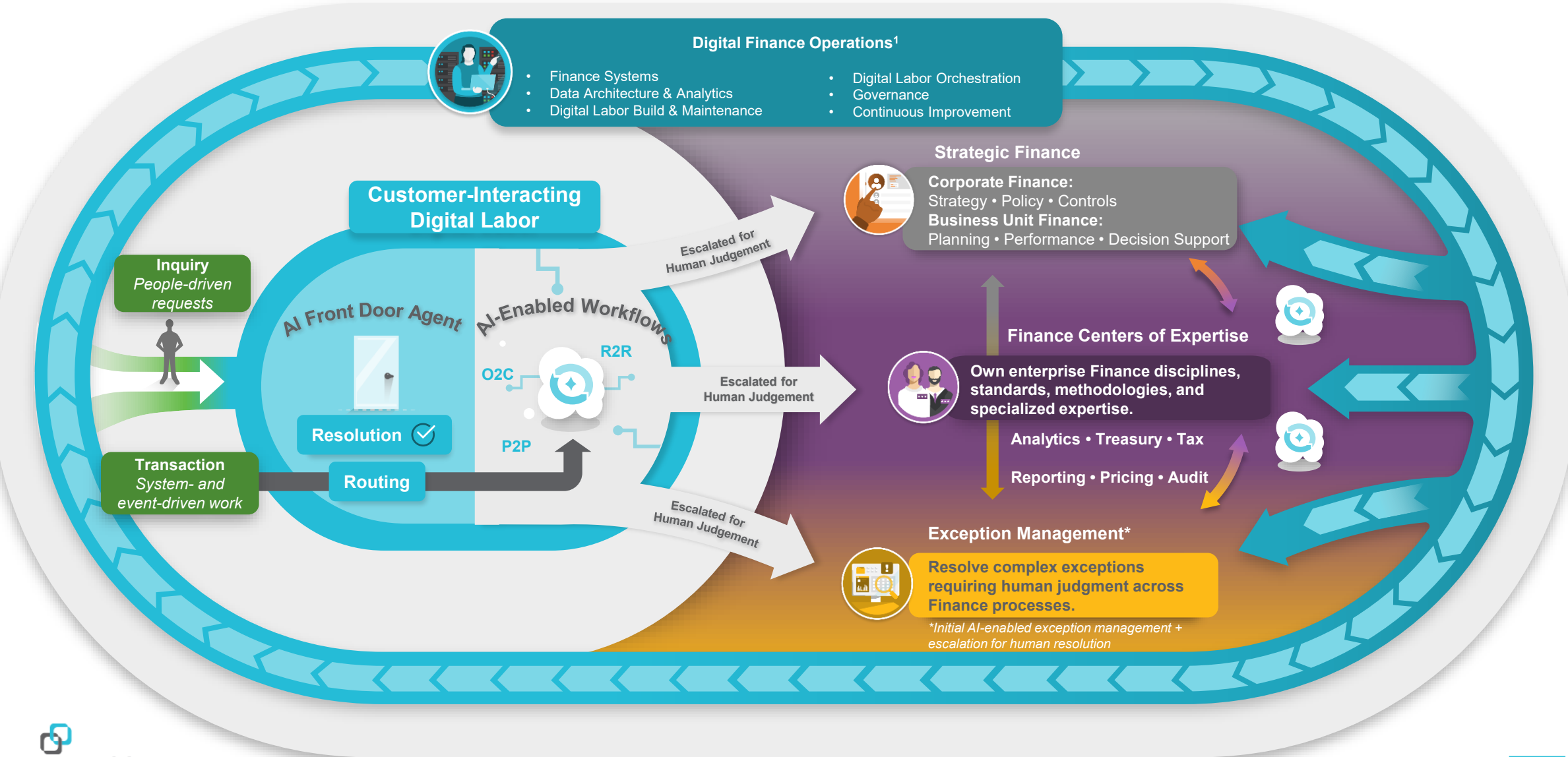
**Silo Elimination**  
Single case across  
functions  
Handoffs ↓ · Rework ↓  
Cycle time ↓



**Enhanced Design**  
Integration + alignment  
Shared KPIs ↑ · CX ↑  
Org strategy support ↑

These shifts are not technology-focused – they are customer experience-focused.

# Example: AI-Enabled F&A Service Delivery Model



<sup>1</sup> Digital Finance Operations will oversee Finance systems and data architecture, orchestrate AI agents, and partner with IT to scale Finance operations.



# Building the Case For Change



# The Case for a Shared Services Transformation

A compelling business case shows how the future-state shared services model will improve enterprise performance, what it will take to implement, and whether the expected value justifies the investment and disruption.

## Define the enterprise value

- Consider cost, capacity, service, customer experience, controls, scalability, and decision support
- Connect each expected benefit to a specific operating-model change

## Understand the full investment

- Include changes to people, processes, technology, data, governance, sourcing, and service delivery
- Account for both one-time transformation costs and recurring operating costs

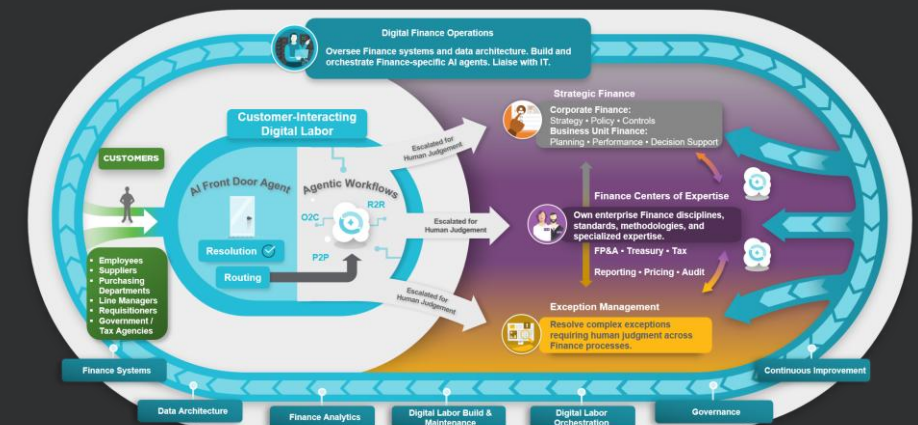
## Establish confidence in execution

- Test the organization's readiness, dependencies, risks, and ability to absorb change
- Determine when benefits will materialize and how they will be captured

## Position AI appropriately

- Use AI to enable intelligent intake, workflow orchestration, automation, analytics, and decision support
- Avoid treating individual AI use cases as the primary rationale for transformation

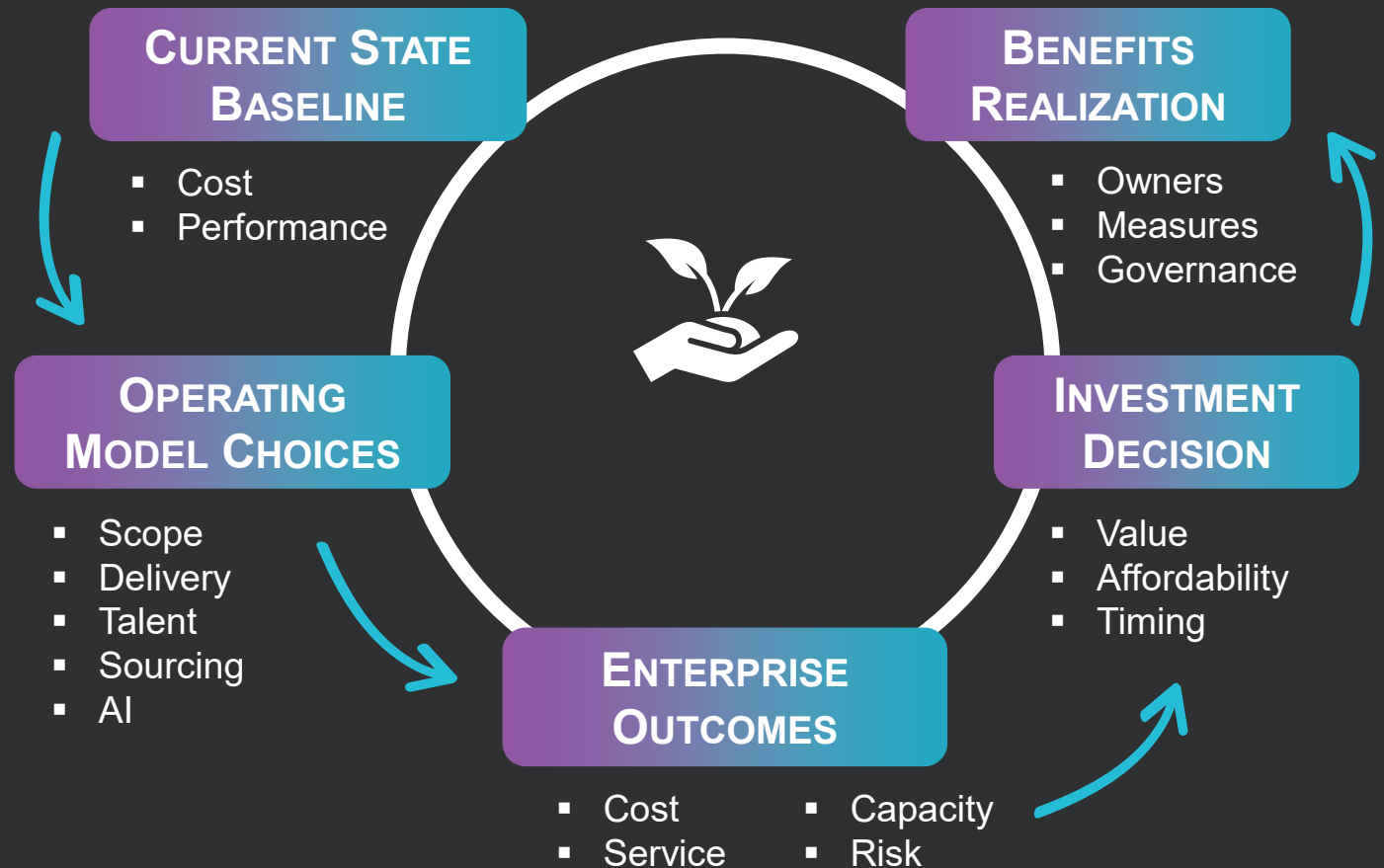
## Enterprise Value



# Connecting Design Choices to Enterprise Outcomes

The business case converts the future-state operating model into a measurable value proposition and an actionable investment decision.

- Establish the current-state baseline and cost of inaction
- Link operating-model choices to measurable outcomes
- Confirm investment, timing, risks, and accountability



## The Cost of Inaction is Part of the Baseline

The relevant comparison is not the future-state model versus today; it is the future-state model versus what the current model will become.



### Current Model Today

- Existing cost and staffing
- Current service performance
- Known process and control issues



### Growing Demand and Complexity

- Higher transaction volumes
- Business or geographic growth
- Increasing customer expectations
- New compliance requirements



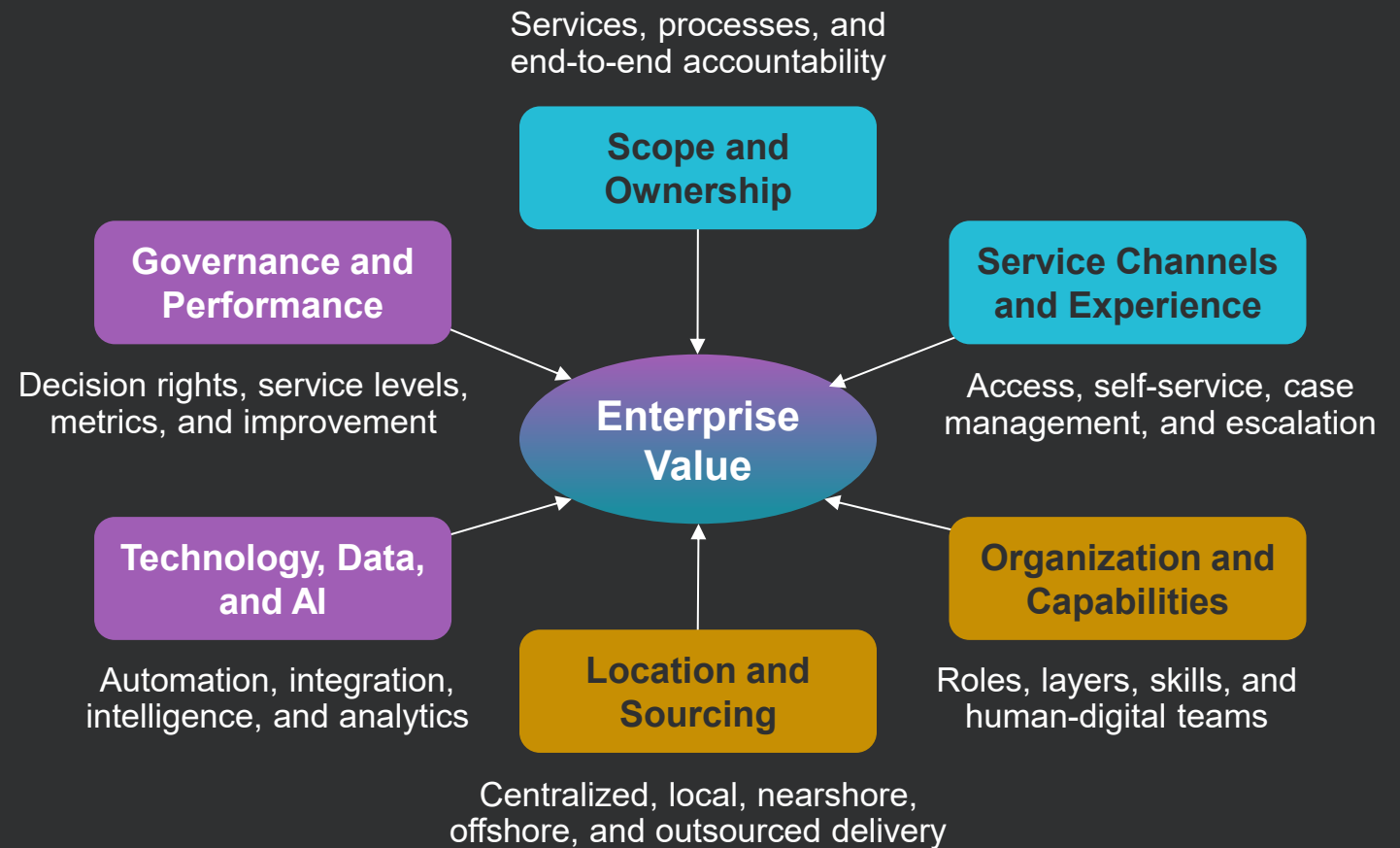
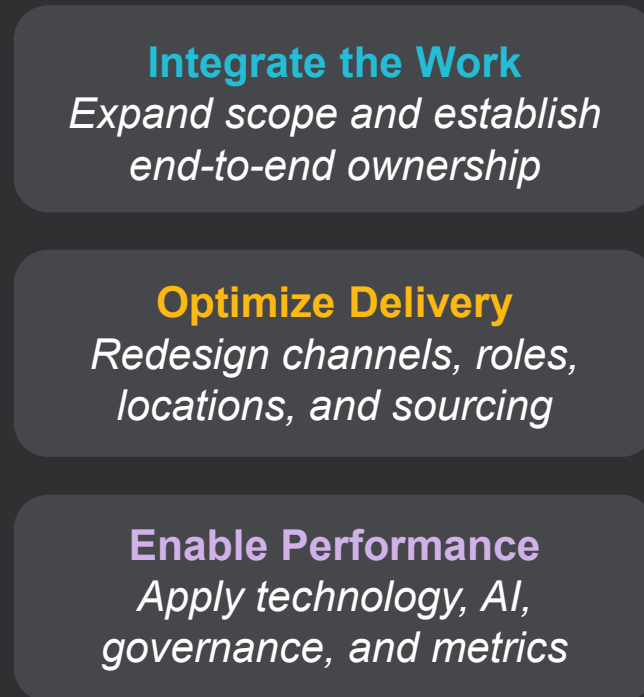
### Projected No-Change Model

- Additional staffing and vendors
- More workarounds and duplication
- Constrained service capacity
- Accumulating technology debt

By doing nothing, cost, risk, service pressure, and capacity challenges will all increase.

# Operating-Model Choices Determine Where Value Is Created

**Shared services creates value through coordinated design decisions,  
not through centralization alone.**



# Financial Benefits Exist Beyond Labor Savings

Financial value can come from workforce, operating, external-spend, and cash improvements.

## Labor and Location Economics



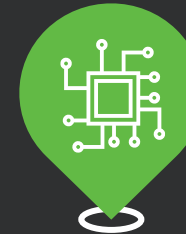
- Eliminate duplicated roles and unnecessary management layers
- Capture labor arbitrage through optimized delivery locations

## Operational Efficiency



- Reduce errors, rework, and transaction processing costs through process redesign
- Capture economies of scale through specialization

## Technology and External Spend



- Retire redundant systems and reduce license costs
- Consolidate vendors, facilities, and administrative spending

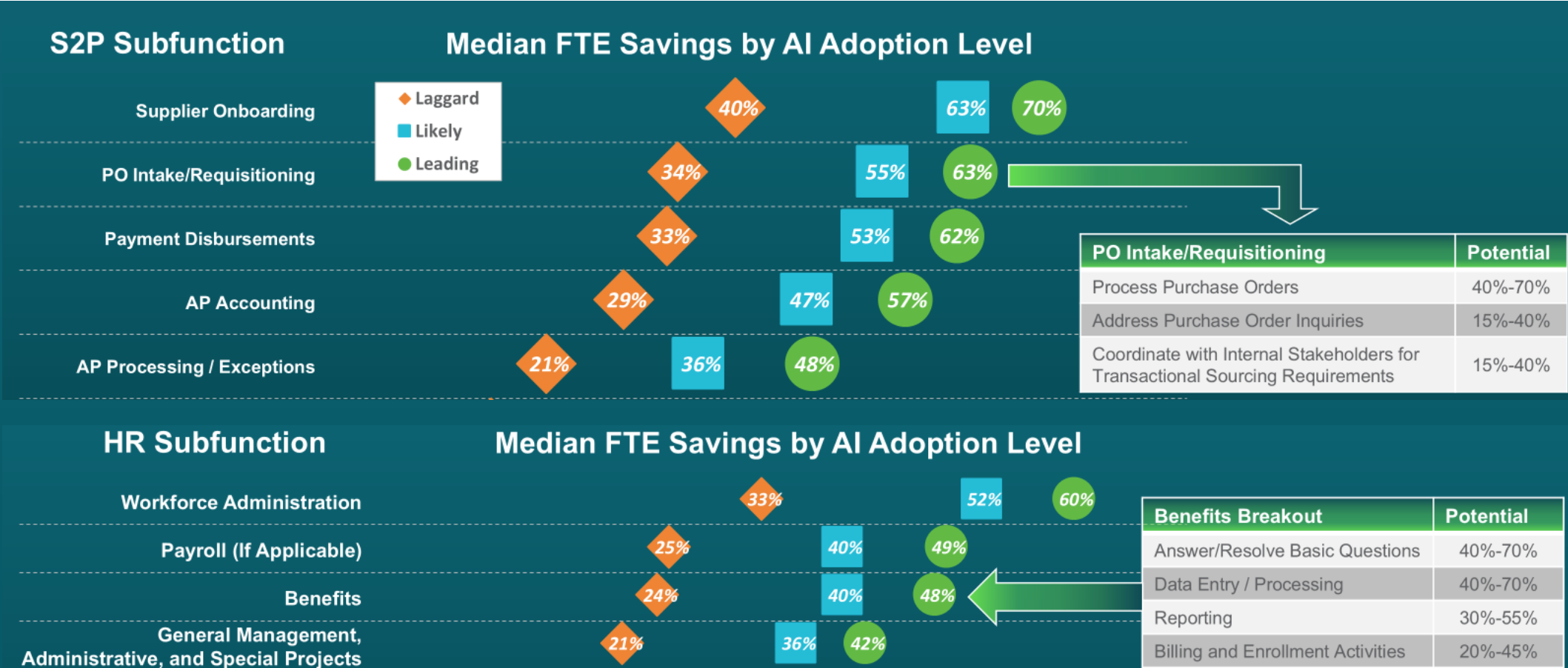
## Working Capital and Leakage



- Accelerate collections and increase early-payment discounts
- Reduce overpayments, write-offs, and financial leakage

# Consider the Impact of AI to Process Efficiency

Based on ScottMadden data, leveraging AI can improve process efficiency by as much as 70%, depending on the specific process being implemented.



## Benefits should also include Strategic Value

Beyond financial and operational benefits, there are also strategic benefits that should also be considered.

### Increased Customer Orientation



- Balances human interaction and self-service tools
- Enables continuous improvement through metrics, dashboards, and analytics

### Improved Controls



- Increases internal controls across the business
- Reduces risks and increases transparency and compliance in processes

### Enablement of Strategic Decision Making



- Improves scalability and nimbleness for acquisitions and major business changes
- Permits better and faster decisions based on company-wide metrics

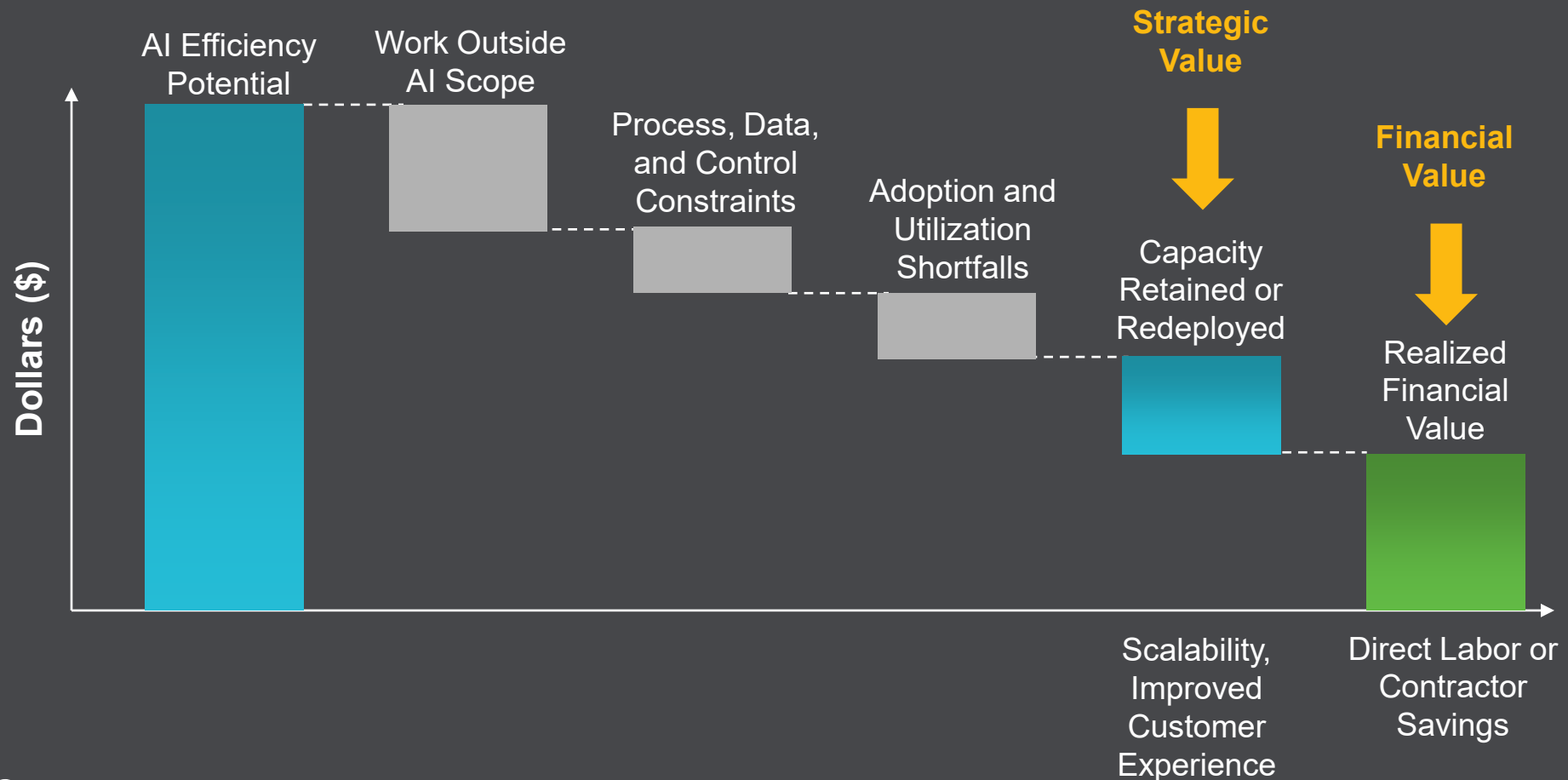
### Enablement of Further Indirect Efficiency



- Reduces cycle times of processes for internal and external stakeholders
- Reduces overall operating costs while improving accuracy and speed of service

# AI Efficiency Does Not Automatically Become Financial Value

AI can reduce the effort required to perform work, but financial value is realized only when the resulting capacity is deliberately captured.



# Capture the Full Cost to Transform and Operate

A credible business case includes the cost to design, transition, stabilize, and sustain the future-state model.

|                                                                                                                   | One-time Transformational Costs                                                                                         | Recurring Operational Costs                                                                                             |
|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
|  <b>People and Organization</b>  | <ul style="list-style-type: none"><li>▪ Severance</li><li>▪ Retention</li><li>▪ Recruiting</li><li>▪ Backfill</li></ul> | <ul style="list-style-type: none"><li>▪ New roles</li><li>▪ Skill premiums</li><li>▪ Ongoing staffing</li></ul>         |
|  <b>Technology, Data, and AI</b> | <ul style="list-style-type: none"><li>▪ Implementation</li><li>▪ Integration</li><li>▪ Data remediation</li></ul>       | <ul style="list-style-type: none"><li>▪ Licenses</li><li>▪ Hosting</li><li>▪ Monitoring</li><li>▪ Maintenance</li></ul> |
|  <b>Transition and Change</b>   | <ul style="list-style-type: none"><li>▪ Program support</li><li>▪ Training</li><li>▪ Parallel running</li></ul>         | <ul style="list-style-type: none"><li>▪ Governance</li><li>▪ Training</li><li>▪ Continuous improvement</li></ul>        |
|  <b>Location and Sourcing</b>  | <ul style="list-style-type: none"><li>▪ Facility changes</li><li>▪ Provider transition</li></ul>                        | <ul style="list-style-type: none"><li>▪ Occupancy</li><li>▪ Contracts</li><li>▪ Vendor management</li></ul>             |

## Test the Case Across Alternate Transformation Paths

Leadership should compare realistic options rather than approve or reject a single predetermined solution.

Increasing Transformation Ambition

### Foundational State

- **Scope:** Targeted
- **Pace:** Phased
- **AI Enablement:** Targeted
- **Investment and Risk:** Low

### Targeted State

- **Scope:** Multifunction
- **Pace:** Sequenced
- **AI Enablement:** Integrated
- **Investment and Risk:** Moderate

### Accelerated State

- **Scope:** Enterprise
- **Pace:** Compressed
- **AI Enablement:** Orchestrated
- **Investment and Risk:** High

## Lessons Learned: Build the Case Around the Operating Model

The strongest business cases treat AI as an enabler of redesigned shared services, not as a standalone technology investment.



### Start with the Model, Not the Technology

AI value depends on clarity about how services, work, and decisions will change.

- Define the future operating model before selecting specific AI solutions
- Establish credible baselines for cost, capacity, service, and performance
- Link each AI capability to specific workflow and operating-model improvements
- Validate process, data, integration, governance, and workforce readiness early



### Make the Value Case Credible

Executive stakeholders prioritize measurable value, feasible implementations, and rapid impact.

- Use conservative assumptions and make the supporting calculation logic transparent
- Separate bankable savings from capacity creation and broader strategic value
- Apply realistic timing lags and benefit-realization haircuts to projections
- Pressure-test key sensitivities with Finance and accountable benefit owners



# Developing a Roadmap and Implementation Plan



## Typical Implementation Work Streams

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

### Typical Implementation Work Streams

#### Program/Project Management

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

Policy  
Standardization  
and Process  
Redesign

Organization  
and Staffing

Technology

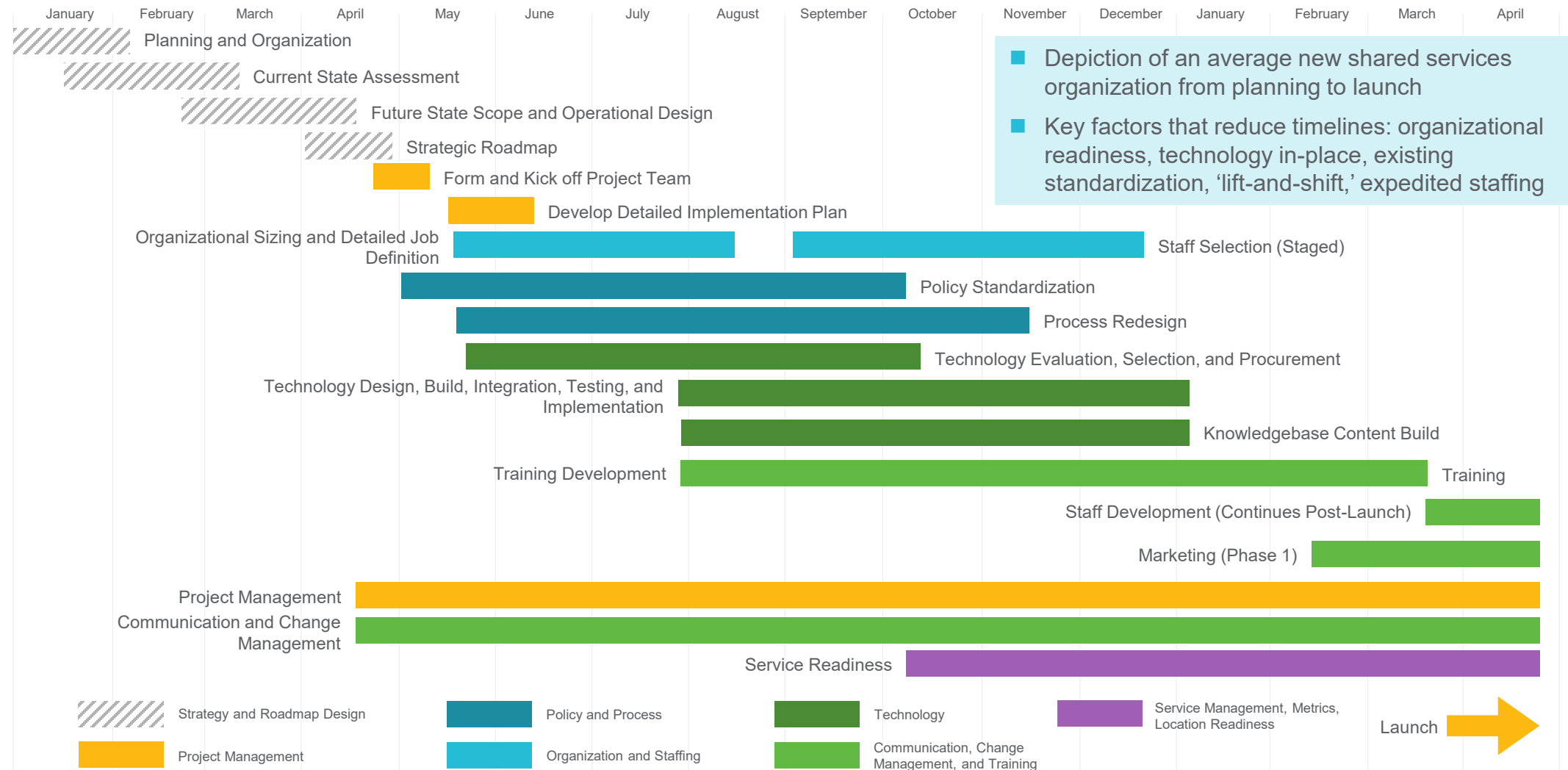
Facilities

Service  
Management  
and Metrics

Communication,  
Change  
Management,  
and Training

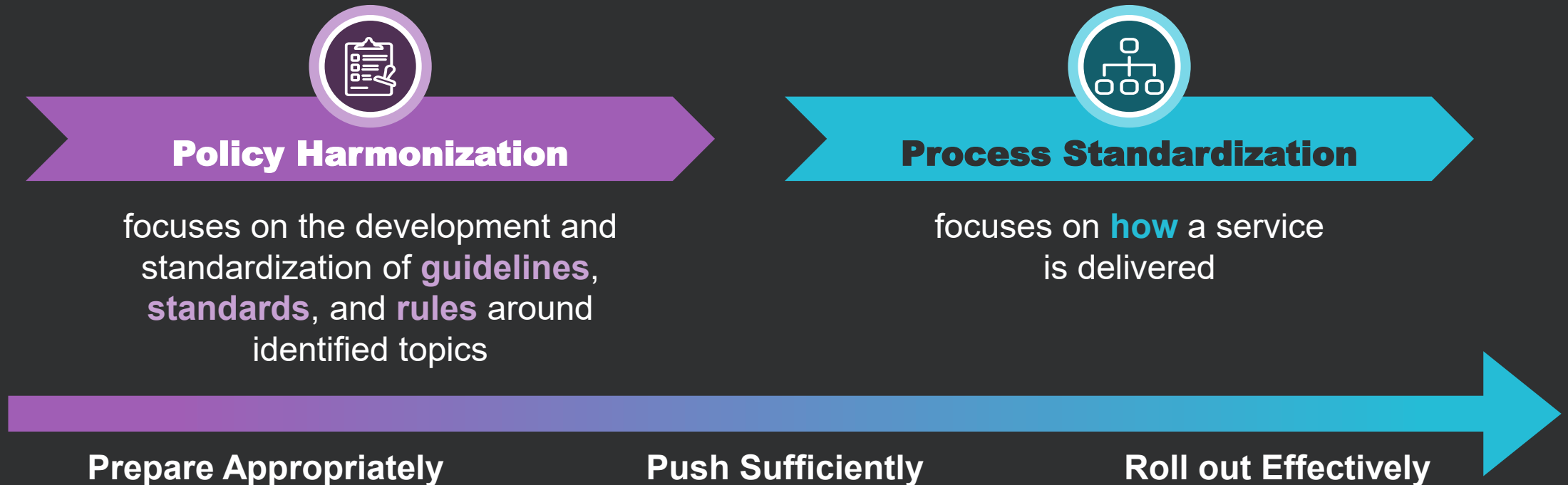
Work streams are distinct but closely integrated. Implementation activities become iterative as work streams progress.

# Typical Timeline



## Standardize Before Automating or Applying AI

Policy harmonization and process standardization are essential steps toward maximizing the efficiency gains of a new operating model. Throughout the policy harmonization process, it is important to remember that policy development and redesign will drive process development.



# Redesign the Workforce Around Human and Digital Labor

Determine how work will be performed in the future before defining roles, staffing levels, or required capabilities.

## SELECT THE BEST FIT PERFORMER

### Deconstruct the Work Types

- Tasks
- Decisions
- Interactions
- Exceptions

**Human-Led:** Judgment, Relationships, Accountability

**Agent-Assisted:** Analysis, Recommendations, Content

**Digital Execution:** Repeatable processes, Workflow

### Redesign the Organization

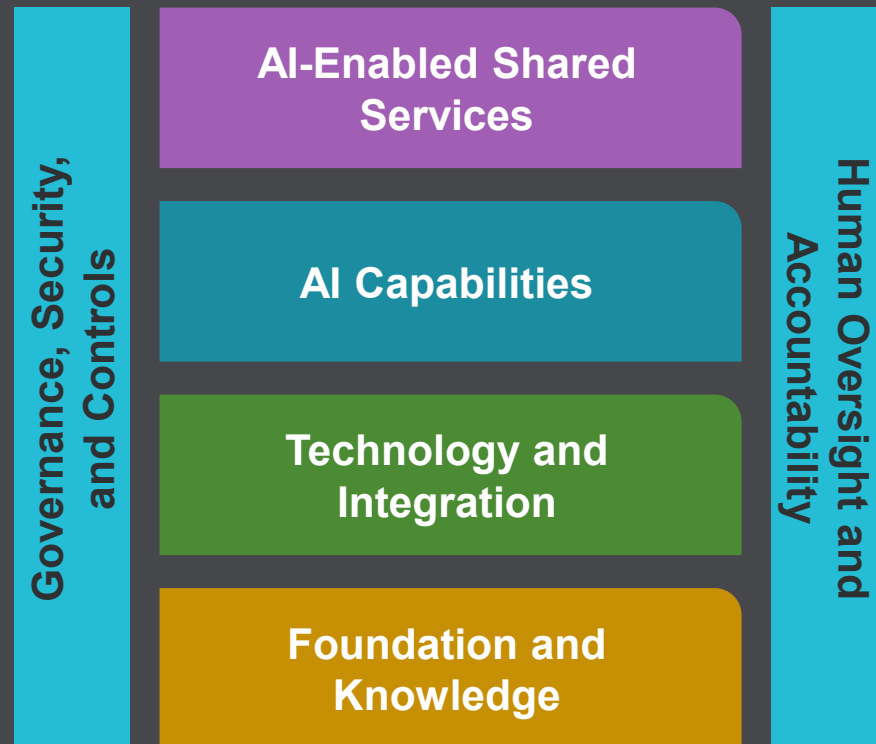
- Role and responsibilities
- Skills and capabilities
- Staffing, spans, and pricing
- Selection process, governance and oversight
- Redeployment or cost actions

Organization redesign tasks must be complete before moving to staffing.  
Design around the work – not individuals

# AI-Enabled Shared Services Depend on a Scalable Foundation

**AI can scale across the operating model only when data, technology, governance, and controls are designed as an integrated foundation.**

- Establish scalable architecture and reusable integration patterns
- Improve data quality, access, ownership, and security
- Connect AI directly to workflows and systems of record
- Define governance, privacy, controls, and acceptable-use standards
- Embed human oversight, exception handling, and escalation
- Monitor technical performance and operational outcomes continuously



- Unified service intake
- AI-assisted decisions
- Digital execution
- Personalized service

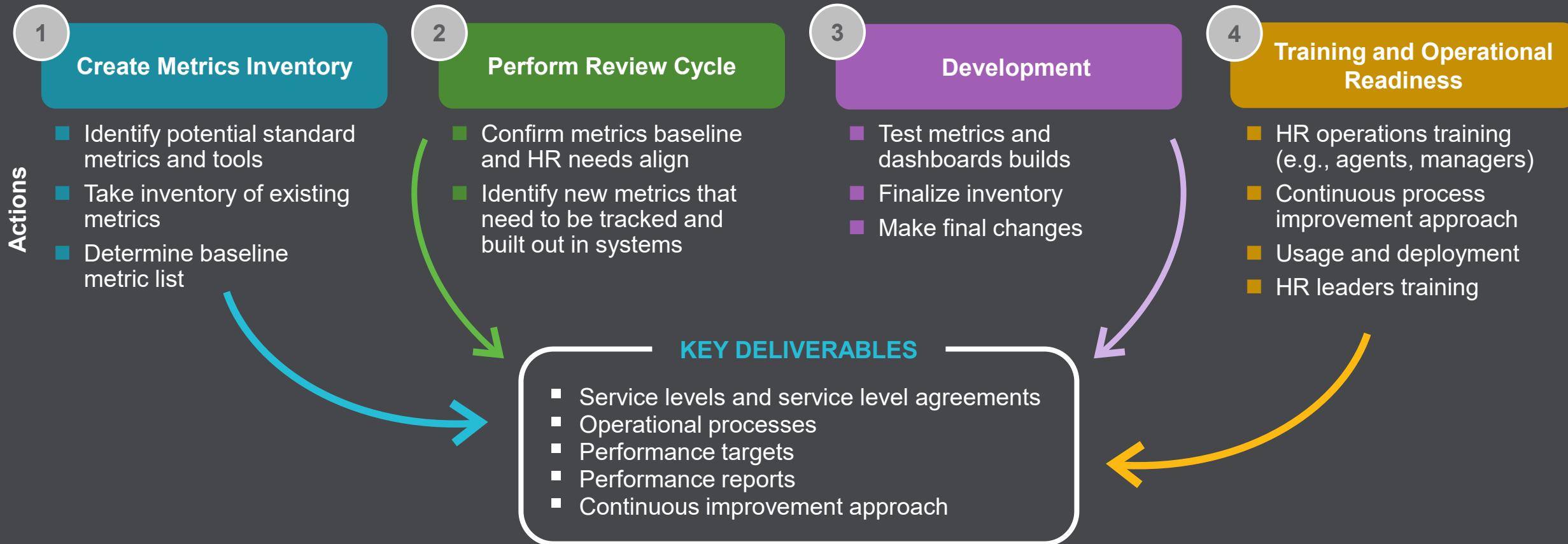
- Models and agents
- Workflow orchestration
- Knowledge retrieval
- Monitoring tools

- System of record
- Workflow platforms
- APIs and interfaces
- Identity and access

- Quality and accuracy
- Ownership and stewardship
- Accessibility
- Standardized content

## Service Management and Metrics

The Service Management and Metrics work stream focuses on vital infrastructure to operating the service center and ensuring integration among the key channels (field services, COEs, and HR operations) of the service delivery model.



# Change Management Framework

Successful change management solutions are based on well-planned and integrated initiatives and actions.

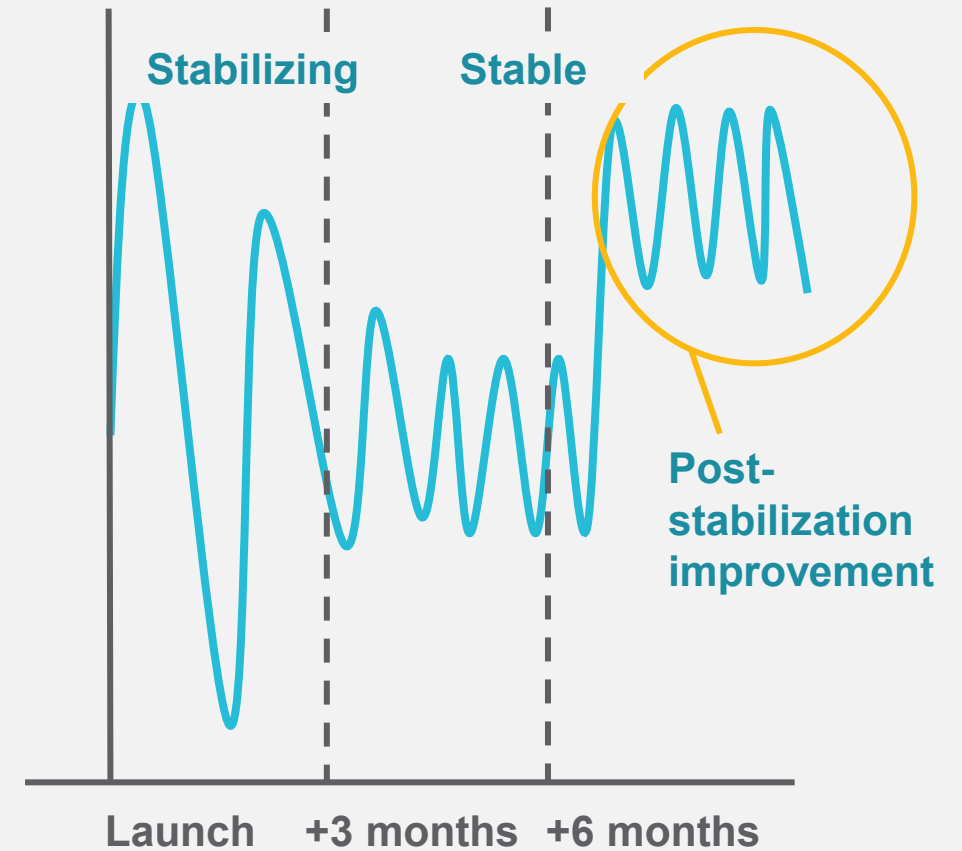
- Assess impact of overall change on stakeholder groups
- Build awareness
- Build, execute, and monitor communication plan
- Create and launch marketing campaign
- Assess training and education needs
- Build plan
- Conduct training and education



# Stabilization Must Convert Implementation into Sustained Value

After launching, it often takes three to six months to stabilize day-to-day operations.

- **Set expectations** with internal customers
- Establish **launch-readiness criteria** and go-live decision gates
- Provide **structured hypercare** and rapid issue escalation
- Establish a “**tiger**” **team** to address stabilization challenges
- **Monitor** service, adoption, control, and AI-**performance measures**
- **Update internal customers** on shared services performance and stabilization
- **Transition accountability** from the project team to operational owners
- Move from **stabilization into continuous improvement**





**Wrap Up**



# Wrapping Up

## **HOUSEKEEPING ITEMS**

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

## **ATTEND OUR MAIN STAGE PANEL**

**Panel:** Beyond Cost Savings: The New Metrics Defining ROI in Shared Services

- Tuesday, Sept. 15, 3:35 – 4:15 PM
- Moderator: Laura Campbell, Partner

## **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!**



## Presentation Copy

If you'd like a copy of the presentation,  
please scan the QR code and enter your contact information.

