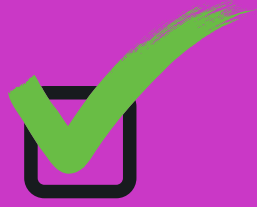




**Chazey
Partners**



7 Lessons Learned From Highly Effective Shared Services

(with apologies to Stephen R. Covey)



While the Shared Services model has several examples of success at delivering higher quality, lower cost, and improved control, many implementations still don't perform at expected levels because leaders overlook some of the basic requirements for leading and driving a successful transformation of the back office.

Here then are the 7 Lessons Learned for Successful Shared Services

01

Be True to Your Name

When implementing Shared Services, you need to be clear about what the name says about your group. Business units can be skeptical about yet another reorganization that from their perspective potentially involves them losing control or accepting more work. Engage the business units in the decision-making, design and build of the new model, and move beyond a branding exercise into true Shared Services.

Always File a Flight Plan

A common failure in attempted transformations is the lack of a business case. Designing a flight plan, or a roadmap, is a crucial facilitator for success of an implementation. Developing a robust business case will help you to manage stakeholder expectations by engaging the client from start and making the negotiated service levels transparent. In addition to supporting the initial decision-making, it acts as a crucial accountability document throughout your journey. For a Shared Services implementation, the plan should cover: baseline and benchmarking; current state assessment; high-level future state design and recommendations supported by a high-level implementation plan that outlines the journey through to design, build, and deploy.



Don't Leave The Customer Behind

If you fail to bring your customer along on the journey, you may achieve a quicker start, but you also will have a more difficult road that may not lead to your desired end state. Engaging your client in the decision-making and design will enable a sustainable solution. Including a Client Interaction Framework will cover off blind spots and keep the client and provider aligned. A leading practices [Client Interaction Framework](#) includes crucial elements such as account management, partnership agreements, performance measurement, and continuous improvement. You can assess your own client engagement using our free online tool (www.chazeypartners.com/cif).

Give Your Teams Air Cover

Introducing and implementing Shared Services without robust change management and communications can be similar to entering unfamiliar territory without air cover. As your team is working on gaining traction on the journey towards Shared Services, support them with stakeholder engagement, a robust communication plan, training, and proactive senior management involvement and support. Without these tools and support, the team's progress will be slow and can actually result in lost ground if the on-the-ground work gets ahead of the air cover.



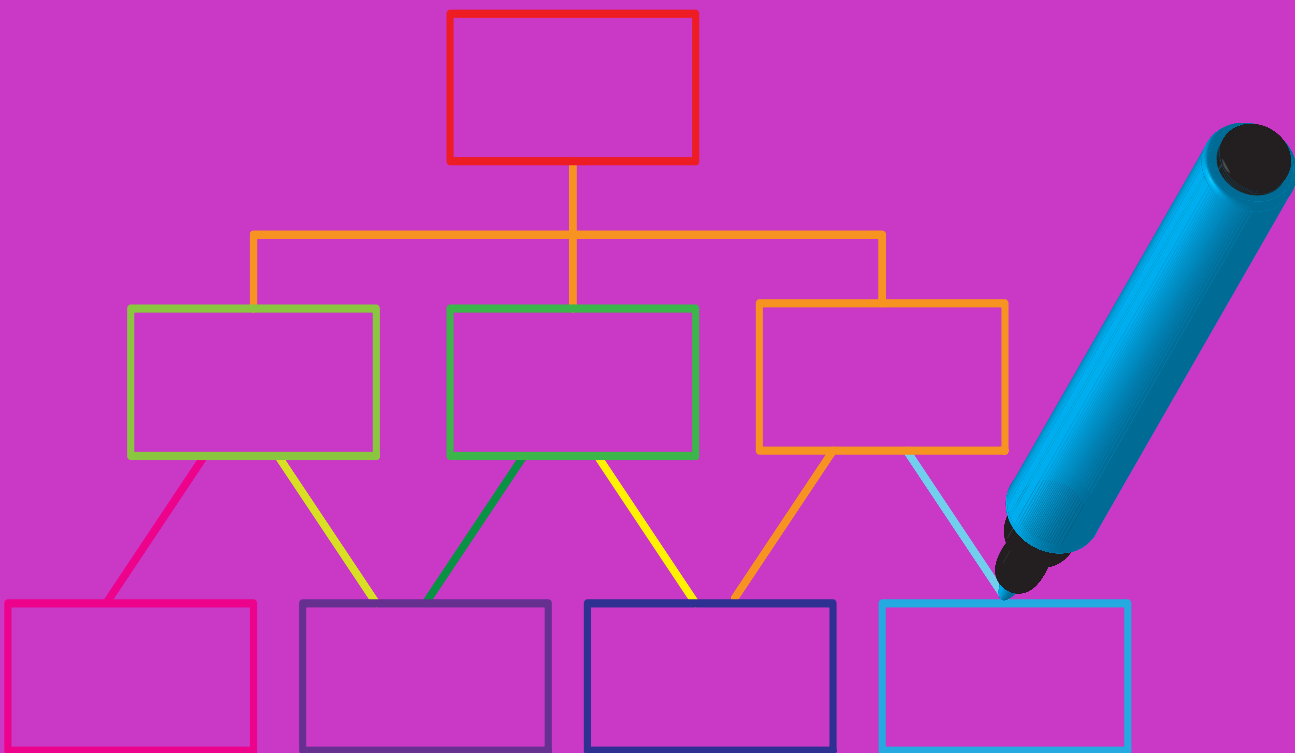
Build on a Strong Foundation

Transactional and administrative services are the backbone of the back office. It is hard to ask your professional and technical staff to provide more value-added, strategic services if they spend their day chasing down issues related to transactions. Many successful Shared Services have recognized this and have first brought transactional and administrative services into the model. Beyond creating a strong foundation, transactional and administrative services typically benefit most from the typical strategies associated with Shared Services such as standardization, process optimization, and technology enablement.



Structure for Success

Success in Shared Services is enabled with functions such as account management, project management, continuous improvement and training. Embedding these functions into your organizational structure as dedicated functions supported by your business case will set your initiative up for sustainable success. Leverage other best practices in organization design such as segregating transaction processing from frontline support. Structure matters, so leverage the lessons learned by those who have already taken the journey.





Take a Team Approach

You do not need to do it alone, nor will you be able to. Reach out to your organization and build an internal team. Partner your team with experienced external expertise that will provide bench strength, technical expertise and strategic advice. Engage your clients and stakeholders as part of the transformation.

Conclusion

Shared Services isn't easy, but transformations and doing things differently are not meant to be. Shared Services has a proven track record, but to achieve your desired future state, leverage these 7 lessons learned of successful Shared Services leaders. Chazey Partners offers online resources to help you with your transformation. If you would like to have an exploratory chat with any of our practitioners to find out how to improve your journey, please do not hesitate to get in touch by emailing us enquiries@chazeypartners.com or visiting our website www.chazeypartners.com

For more articles on Chazey's Toolkit, please visit
www.ChazeyPartners.com/Resources
or subscribe to our newsletters at
www.ChazeyPartners.com/Subscribe

Chazey Partners is a practitioners-led global management advisory business. We bring together a unique wealth of experience, empowering our clients to strive for world-class excellence through Business Transformation, Shared Services & Outsourcing, Technology Enablement, Process Enhancement and Corporate Strategy Optimization. We pride ourselves in having built, operated and turned around some of the world's most highly commended and ground breaking Shared Services Organizations, and for implementing many highly successful multi-sourced delivery solutions. Over the last 20 years, we have delivered numerous programs globally, in the US, Canada, UK, Continental Europe, Ireland, India, Eastern Europe, South America, Singapore, Australia, China, Middle-East and Africa.

Our experience covers both Private and Public Sectors, providing expertise in a wide spectrum of business functions, including Finance, HR, IT and Procurement.

Learn more about us at www.ChazeyPartners.com.

Follow us on [LinkedIn](#), [Twitter](#), [Facebook](#) and [Google+](#)

Phil Searle
CEO & Founder
Chazey Partners
philsearle@chazeypartners.com

Esteban Carril
Managing Director, Latin America
Chazey Partners
estebancarril@chazeypartners.com

Chas Moore
Managing Director North America (West)
Chazey Partners
chasmoore@chazeypartners.com

Rob Serjeant
Managing Director Asia-Pacifc
Chazey Partners
robserjeant@chazeypartners.com

Robert Towle
Managing Director
North America (East)
Chazey Partners
roberttowle@chazeypartners.com

Daniel Lawrence
Regional Director, Europe
Chazey Partners
daniellawrence@chazeypartners.com