



**Our Experience. Your Success.**



**Workshop A**  
**November 30, 2017**



- **RETHINKING THE ROLE OF CONSULTANTS AND ADVISORY FIRMS IN SHARED SERVICES IMPLEMENTATION**

Given the complexity, and heightened regulatory environment, faced by higher education and government entities, consultancies can be a great resource for navigating these challenges, especially within a limited timeframe. There is a misconception that advisory counsel represents only “all-inclusive” packages that foist cookie-cutter Shared Services models on their clients.

Join this workshop if you’re interested in more of an a la carte approach, or would like to learn when and how to leverage advisory firms for select phases of your implementation.

# Introductions



## **PHIL SEARLE, FOUNDER AND CEO**

Phil Searle has more than 25 years of experience in Finance, Shared Services, Technology and Outsourcing and is a globally recognized expert in business transformation, shared services, offshoring, and outsourcing, covering both the private and public sectors. Prior to founding Chazey, he was Group Vice President and CFO of Cendant TDS International, responsible for all aspects of Finance across four continents, including Decision Support, Financial Planning & Analysis, and Controllershship and Financial, as well as certain HR Shared Services. Prior to Cendant, Phil was VP Finance and Corporate Controller at 3Com Corporation. Here he headed the Corporate Controller Function and the Worldwide Shared Finance Services team. His responsibilities included far reaching organizational, technology, service delivery and business process improvement initiatives resulting in the global roll-out of ERP solutions and Shared Services for Finance, HR, Supply Chain, Logistics and Customer Support.

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## **CRAIG ACKERMAN, PRINCIPAL FEDERAL PRACTICE AND HEAD OF GLOBAL RPA PRACTICE**

Craig brings over 25 years of experience in business leadership, transformation, shared services and outsourcing to this role. He is an accomplished C-level partner, with multiple successes in rapidly assessing organizational leadership capabilities, team effectiveness and key processes to define or optimize corporate structure, enhance service quality and achieve strategic savings. Recently Craig was SVP and Director of a multi-function finance, HR and procurement shared services team at Day & Zimmermann, a \$2.7B industrial, defense, and workforce services organization. In a previous role with SAIC, a Federal service provider, Craig was Deputy Director for Shared Services as well as a member of an enterprise PMO charged with removing \$100M in overhead costs through functional transformation, shared services establishment and strategic cost reduction..

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## **ROBERT TOWLE, CHIEF OPERATING OFFICER**

Robert has over 20 years of experience in finance, shared services and technology implementations. He has managed multiple shared services transformation projects and has held multiple roles managing shared services operations in the U.S., U.K. and in multiple locations in India. Recently he has led an assessment of a multi-university system including Finance, Information Technology and Human Resources as well as engagement for the transformation for the EMEA region of a multi-billion financial services firm, including building an Accounting Shared Services Center and Center of Expertise for FP&A.

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## Global Management Consulting & Advisory Services

### Shared Services

From Business Case to Deploy, to correction & optimization or expansion of existing operations to GBS

### Robotic Process Automation

Automation assessment, proof of concept, vendor selection & provider of RPA solutions

### Business Transformation

Process Optimization, Organization Restructure, HR services, recruitment & training

### Enterprise Wide Security

Business Continuity Planning, assessment & implementation



1

#### Who We Are

Founded 2006, headquartered in California, global offices, over 50 full-time & 70 specialist resources

2

#### What We Do

Evaluations & assessments, strategic advice, project management, process and market expertise

3

#### Where We Focus

Finance, Human Resources, IT, Procurement, Facilities & other functions

4

#### The Chazey Difference

Practitioners first, staff continuity, knowledge transfer, client engagement in transformation

# Who We Have Worked With



## OUR CLIENTS

## WHERE WE COME FROM

# Our Service Offerings



## OUR SERVICE OFFERINGS

### SHARED SERVICES

End-to-End: From assessment to implementation

Optimization & Rebooting

Outsourcing Assessment

Technology Enablement

Global Business Services

Robotic Process Automation (RPA)

Coaching

### BUSINESS TRANSFORMATION

Organization Design

Staffing Services

M&A

Technology Enablement

Business Continuity Planning

### ENTERPRISE WIDE SECURITY

Audit Services

Cybersecurity

Operational Security

Business Continuity Planning

## GLOBAL MANAGEMENT CONSULTING & ADVISORY SERVICES

## Why Not?

- Has worked well in the Private Sector for 25+ years, and is also working in the Public Sector today

## Significant funding issues... Everywhere

- Funding issues are everywhere. Shared Services can deliver potential 'triple benefit' of efficiency, effectiveness and controls

## Part of the solution to the new socio-economic challenges

- Impact of aging population
- Increased international competition
- More difficult economic environment

## Free up resources for core activities

- Cost savings from the 'back office' can be used to fund core and front line services

# Public Sector Challenges



- While the same basic challenges and significant opportunities exist around implementing, **the approach needs to be adapted and applied differently**
- Although public sector adoption of shared services has grown, **the results achieved do not yet approach those in the private sector**
  - Remember that the **scope across the “back office” is very significant.**
  - Must determine **what needs to be physically close to the internal “customer” or “client” vs. what can be done remotely.**
  - Consider **who your “client” is** – internal and external. Also need to think about **“citizens” as key stakeholders.**

## Pros

Take 5 minutes to brainstorm  
your perceived benefits to  
engaging advisors

## Cons

Take 5 minutes to brainstorm  
your perceived risks to  
engaging advisors

- Best Practices of Public and Private Sectors
- Dedicated, Knowledgeable Resources
- More Rapid Project Completion Timelines
- Practical Experience
- Change Management Techniques

# Top 5 Rules: Maximizing Value from Consultants

1

Do not defer direction or governance

2

Right People for Right Roles

3

Determine when to bring in (and when to say goodbye!)

4

Ensure knowledge transfer is in place from the beginning

5

What is brought by consultants must be made relevant and applicable to you!

# Transformation in Five Phases

## Roadmap with Financial Business Case

- Provides framework to achieve executive buy-in & sign-off; Acts as essential control mechanism
- Key activities: stakeholder interviews, Activity Based Analysis, Leading Practices Diagnostics

## Design

- Provides all templates, plans and frameworks to support actual deployment
- Key activities: Design processes & technology, plans for training, hiring & employee transition

## Build

- Building processes & technology, training staff, and set-up of end-state location
- Key Activities: Configure processes, build technology, recruitment & training

## Deploy

- Full operationalization of new end-state across organization with new processes and systems
- Key activities: Detailed deployment plan, testing, Service Partnership Agreements

## Stabilize

- All functions fully integrated, process-orientated, client-focused, culture of continuous improvement
- Key Activities: Optimize work allocation, continuous training, comprehensive feedback review

## Roadmap and Implementation

**Project plan, with supporting Business Case**

**Comprehensive review considering all opportunities  
across functions, processes, sub-processes, etc.**

**Differentiation between “solutions” vs “quick fixes”**

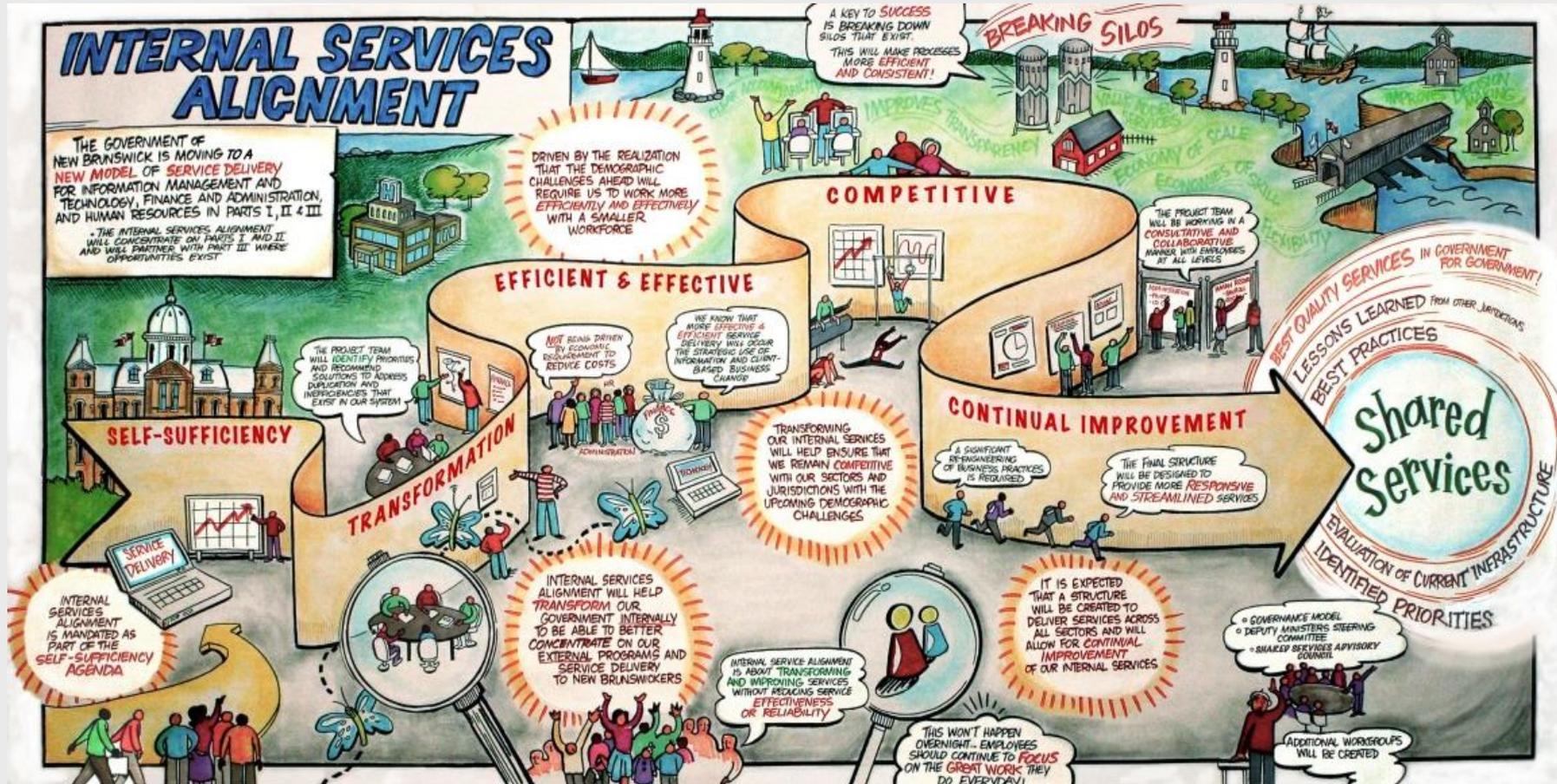
**Multi-faceted change management strategy and approach**

**Accountability and process ownership**

**Dedicated project management**

- Goal to bring Transactional and Administrative services into a single model due to pressures of:
  - Required Investments: ERP & IT Infrastructure & solutions
  - Aggressive savings targets: Shrinking workforce
  - Capacity Management: Numerous large priority initiatives
  - Impact of change on our employees
- Business Case helped sustain support through administration change
  - Specially designated Steering Committee
  - Comprehensive Activity Based Analysis
- Passed legislation to give Internal Services Agency (ISA) power to operate as a business
  - Autonomy of operations
  - Divergence from “normal”





- Benefits Achieved
  - \$8.8m in annual savings, net of investment
  - Government-wide strategies enabling more coordinated decision making
  - Economies of scale with more consistent service delivery
  - Opportunities for staff development and growth
  - New perception of proactive customer service and adding value
  - Improved staff retention and recruitment



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**Accountability and process ownership**



**Dedicated project management**

- Initial Shared Services work led by the governing board and an external firm
  - Finance
  - Information Technology
  - Human Resource
- Initial approach sputtered due to the lack of the following:
  - “Buy-in” from the functional staff at each university
  - “Ownership” on the financial targets, objectives and timeline



- Approach revisited and supplemental validation exercise initiated
  - Some modifications to initial findings
  - Larger benefit of functional area engagement leading to:
    - Better understanding and support for overall project
    - Foundational groundwork for Shared Services activities
- Benefits achieved:
  - Detailed view of savings opportunities and approach for achieving synergies and economies of scale
    - Including the integration of an approved HR system into the overall IT plan saving a \$20m investment
  - Improved governance structure aligning short and long term strategy

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## Post-Implementation

“Fresh Eyes”

Correction of sub-optimal activities

Analysis for and movement towards best practices

Adoption of new or untapped technology enablers

Identification and analysis of opportunities for expansion

- Good initial work in the Business Case and Design
- However, due to the time schedule, the Build cycle was compressed and rushed Deployment
- Resulted in sub-optimal service delivery and customer issues
- Fixed through
  - review of services
  - leadership change
  - a comprehensive “playbook” of areas to modify
- Successful ‘re-boot’ led to expansion
  - HR activities for additional schools and medical center



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Adoption of new or untapped technology enablers



Identification and analysis of opportunities for expansion

- **The US Department of Health and Human Services (DHHS) Shared Services** “Program Support Center” (PSC) provides support services to all components of the U.S. Department of Health and Human Services (HHS) and other Federal Government agencies worldwide. PSC has a broad range of over 40 services and products
- To clarify customer confusion around “true costs” or “full costs” in an allocated environment, the PSC **operates with funding received at the beginning of the year**, with the commitment to ensure costs are agreed upon.
- They work throughout the year with their customers to ensure cost discipline – and agree upon any additional funding needs via **Service Level Agreements (SLAs) or Inter Agency Agreements (IAAs)**



- To support its cost discipline expectations and understanding, the agency engaged outside consultants to:
  - Enhance its Metrics Framework to provide consistent reporting aligned to best practices incorporating:
    - Technology enablers
    - input from consultant, customers and providers
  - Develop focused Key Performance Indicators covering four major areas
    - Input
    - Operating
    - Individual
    - Output





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# Specific Ways to Use Consultants



- Many specific ways to utilize Consultants
- Two Examples to follow:
  - Benchmarking
  - Robotics Process Automation (RPA)

# Benchmarking Exercises

Yourself and Your Past Performance

Your organization – “Best Performance”

Peer Organizations

Global Best Practices

- The “New Frontier” of Robotics Process Automation (RPA)
  - “Bots” transact in any IT application or website, typically in the same way a human would, to automate complex, rule-based work
- Benefits of using RPA:



# Additional Questions and Answers



# Leverage Our Experience for Your Success



# Contact Us



 <http://www.chazeypartners.com/>



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