



Maximizing Shared Service Effectiveness & Efficiency

Webinar

A client-focused firm specializing in...

Strategy and Marketplace Differentiation

Diagnosis and Assessment

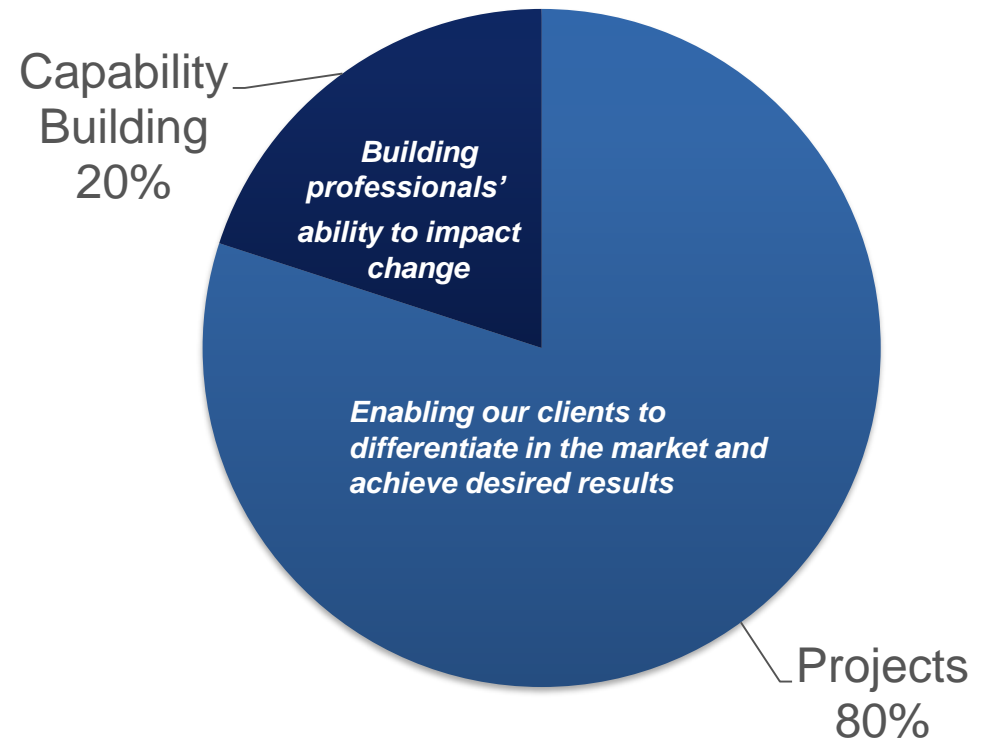
Organization Design

Change Leadership

Leadership Alignment

To drive differentiation through alignment

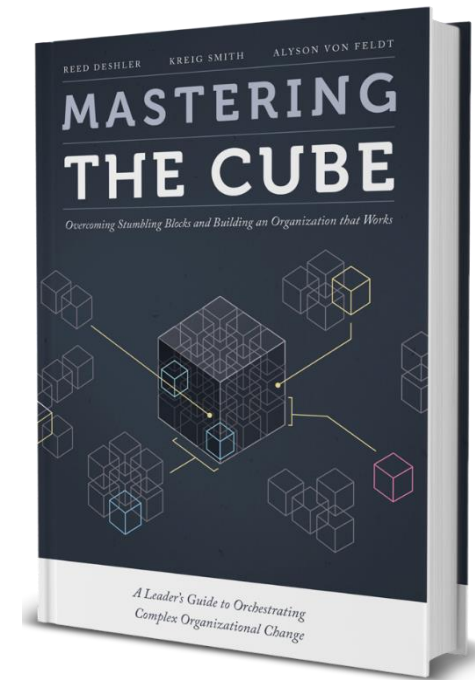
Work Breakdown



Triggers of Shared Service Design or Optimization Efforts



- ❑ **Protect strategically vital work** from becoming engulfed by the **transactional work** that characterizes so much of what must get done on a daily basis
- ❑ Consider the strategic impact of work when making resourcing decisions. As a rule, generally **allocate resources to strategic work** with a goal of greater effectiveness, but **manage non-competitive work toward greater efficiency**
- ❑ **Guard against functional imperatives** and professional standards **that are misaligned to strategy** and don't enable differentiation



Steps to Shared Service Success



4. Plan & Manage Change

Focus resources on planned, effective change management

3. Create Together

Co-creation with clients enables focus on both effectiveness and efficiency

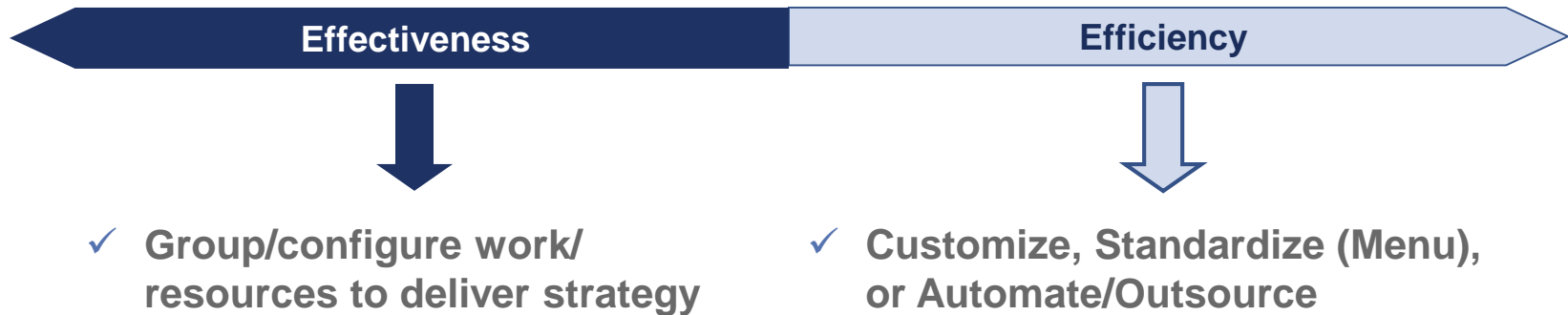
2. Identify Capabilities

Select key capabilities required to deliver on strategy requirements

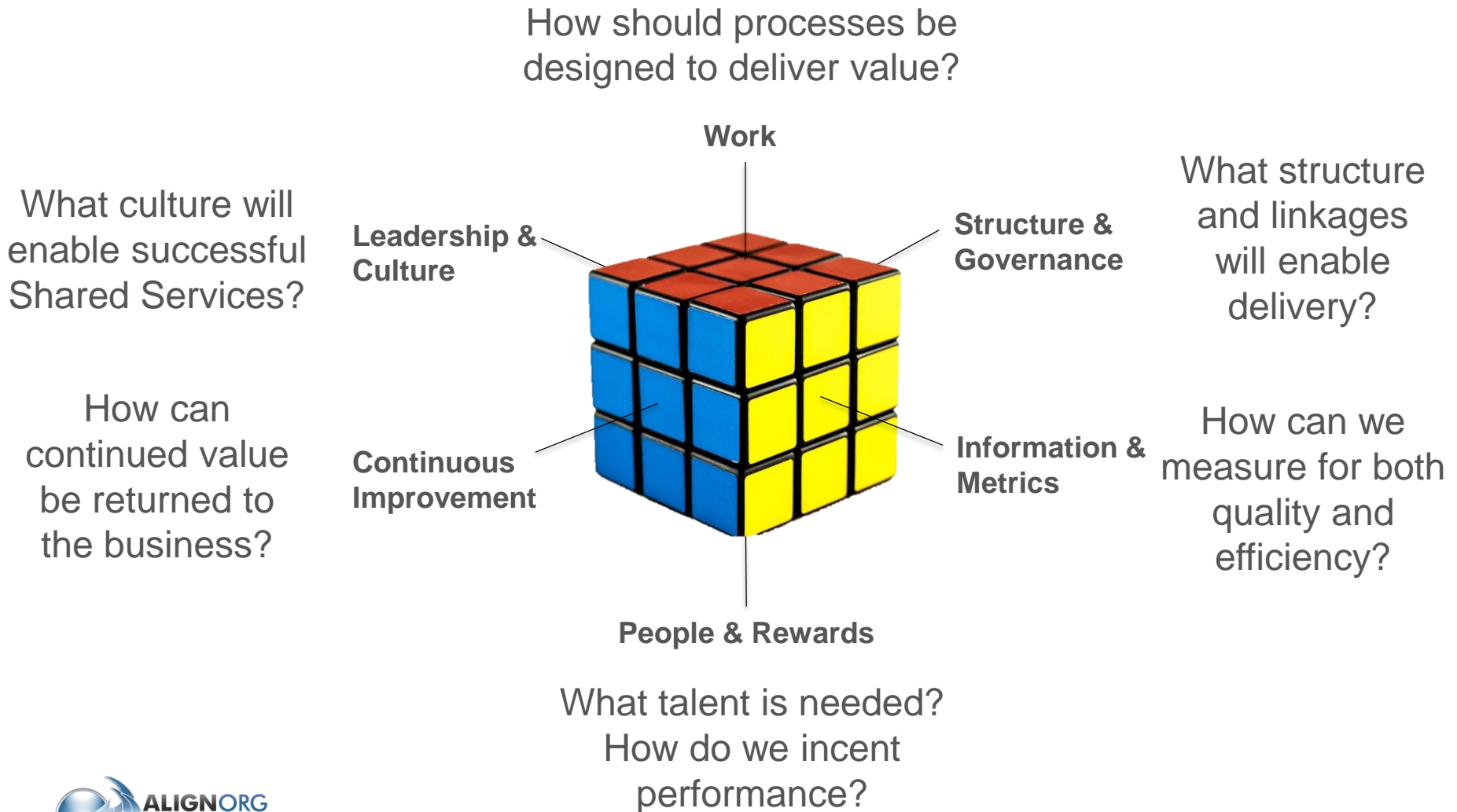
1. Start with the Work

Ensure clarity and alignment with organization strategy and the resulting requirements of the shared service organization

Strategic Work Activities (Greatest Value)	Essential Work Activities (Non-Strategic Work)
<p>Work that:</p> <ul style="list-style-type: none">◦ Make your strategy happen◦ Bring value directly to your customers/constituents◦ Create sustainable, differentiation against competitors or substitutes	<p>Work that:</p> <ul style="list-style-type: none">◦ Are essential to your business, but not to your customers◦ Are only a disadvantage if not performed adequately◦ May be regulated or legislated



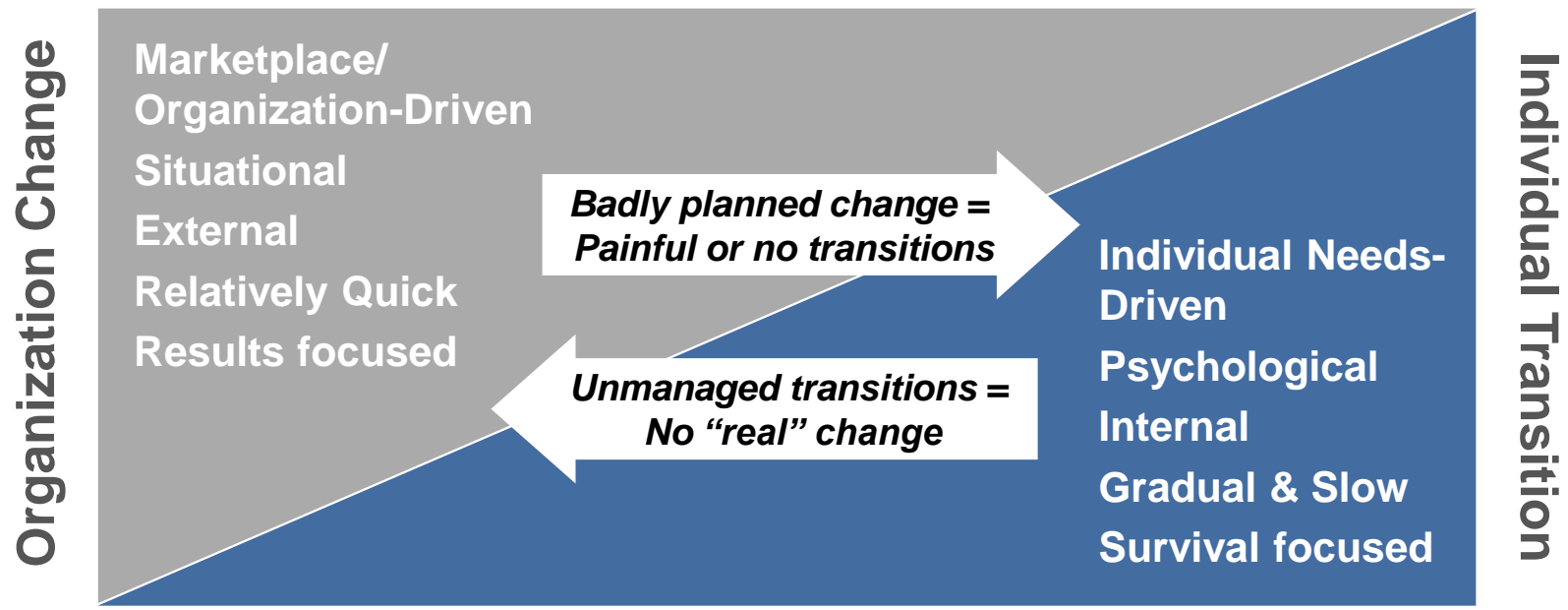
Depending on your Shared Service strategy...



Business Needs + Function Thinking = Fit-for Purpose Shared Services



Organization Change vs. Individual Transitions

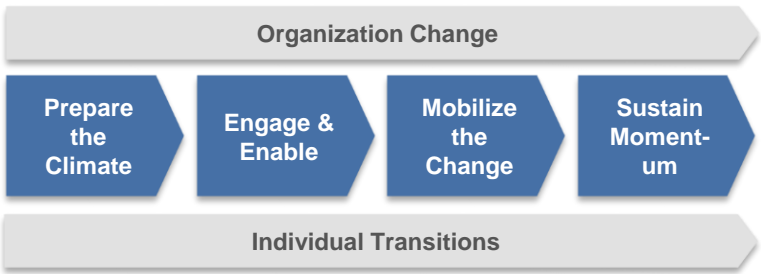


Adapted from William Bridges & Associates.

4. Plan & Manage Change

Integrated Capabilities

APPROACH



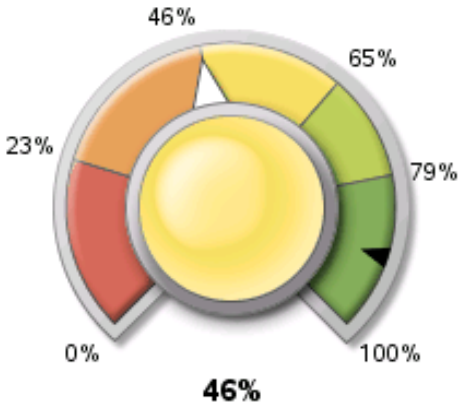
TOOLS



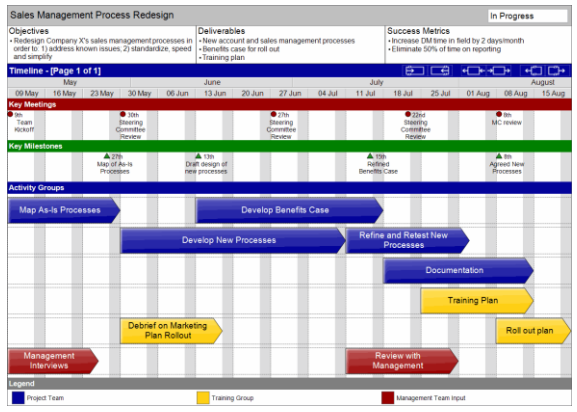
TRAINING



KPIs



PLANS



STRUCTURE



4. Plan & Manage Change

Key to Success: Work Transitions

CURRENT			TRANSITION			FUTURE		
Work Activity/ Project/ Capability/ Process	Eliminated, Changed, or Moved? Description:	Current Role/ Position (Who does this today?)	When will work Start, Stop, Change, or Move?	What must occur first?	Who will oversee the transition?	New Role/ Position Who will do this tomorrow?	When will the New Role/ Position begin this work?	What training, job shadowing, etc. is required?
N2500	Moved to BP of Sales	Sally Reynolds	March 2016	Harry must get into the new role	Mike S.	Senior BP of Sales	March 2016 (if role is filled)	Training on all technical sales processes
SAP Tier 1 support	Changed to Outsource provider	Help Desk in (Atlanta, London, Singapore)	April 2016	Knowledge Transfer	Angel N with HCL support	Outsource Provider	March 2016	All knowledge moved successfully and coordination complete
SAP Tier 2/3 Support	Moved	Denver IT organization along with contractors in Miami	June 2016	Tier 1 support moved over to Outsource provider N2500 moved to Sales	Mike S	Head of SAP - Sally Reynolds team	May 2016	New SAP training completed
Executive Compensation Tracking Software deployment	Eliminated	Business System Analysts under Roger F.	March 2016	Nothing				



Steps to Shared Service Success



4. Plan & Manage Change

3. Create Together

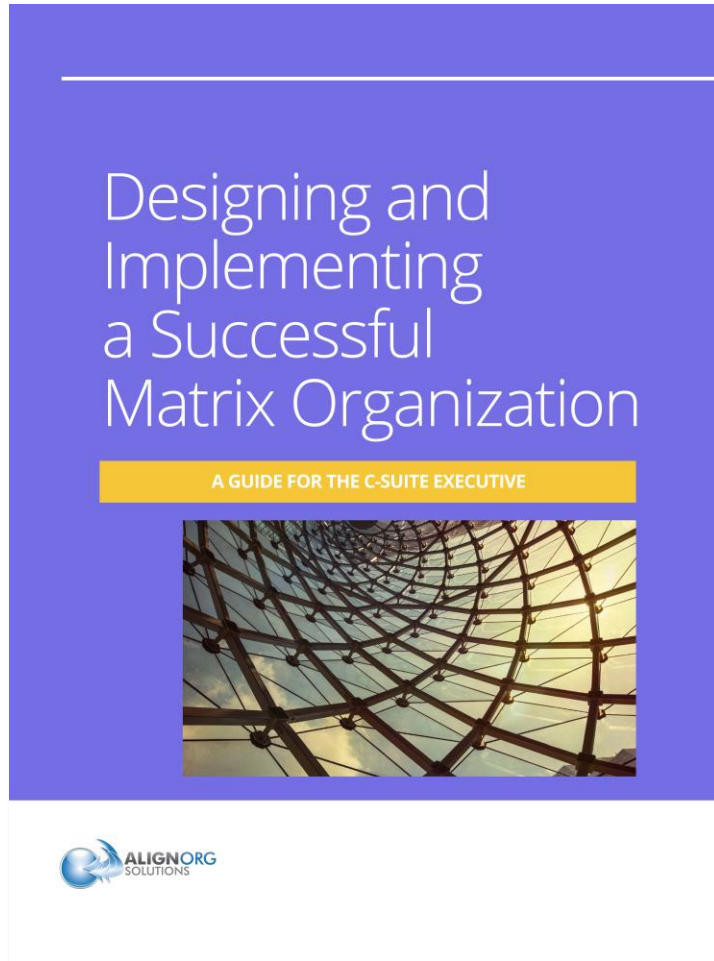
2. Identify Capabilities

1. Start with the Work

1. What is the trigger for a Shared Service design or optimization effort in your organization?
2. What mindsets about the design, set-up and implementation of a back-office Shared Service need to be addressed in your organization?
3. How can I ensure we have the right capabilities, tools and support to effectively design and implement a back-office Shared Service organization?



Thank you! Questions?



For today's webinar guests:

Designing and Implementing a Successful Matrix Organization
A Guide for the C-Suite Executive

Watch your email for this practical guide.

Today's Presenters



Reed Deshler, is an organization catalyst. He works with executive teams and human resources teams to define winning strategies, align organizations and business models for success and mobilize employees in the desired direction. A change leader, organization design expert and principal of the management consultancy AlignOrg Solutions, Reed

brings multi-dimensional business models to life for Fortune 500 companies, middle-market businesses and non-profits so they can align strategy with operational reality.

Reed is coauthor of Mastering the Cube: Overcoming Stumbling Blocks and Building an Organization that Works, a guidebook that Clayton M. Christensen, professor at the Harvard Business School calls, “a great step-by-step manual on defining and changing the design of your company.”

Reed has guided numerous Fortune 500 companies — including Tyco, 3M, Abbott Laboratories, Hertz, Cummins, Cisco, and USAA — through change successfully. When companies are looking to propel growth through organizational transformation they call on Reed and his team. reed.deshler@alignorg.com

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Mike Smith, Ph.D. is a leadership and organization development catalyst who specializes in leading change management planning and aligning organizations' processes, choices and leaders to drive results. Mike comes with deep experience in the public sector and has advanced degrees in leadership

development and public administration.

Mike has worked with organizations across a myriad of industries including Tyco, Lowe's, Cummins, Honda, the Centers for Disease Control, the Department of Homeland Security among others. His focus is on supporting leaders in making and implementing choices aligned with strategy.

Mike has worked with executive groups in numerous organizations – public and private. He is a strong facilitator who helps leaders and groups through the decision-making and change processes in high-stakes, complex organizational situations. He helps leaders understand the use of power and influence to create and sustain real growth in organizations.

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