



## 2019 global shared services survey Key trends and findings: From order taker to value maker.

Shared services organisations are becoming increasingly more global, complex, and digital as companies seek to provide nimble and efficient services, a better customer experience, and high-impact business outcomes. Deloitte's 2019 global shared services survey reveals that shared services centers (SSCs) are increasingly shifting from being a "provider of what they ask for" to a generator of tangible business value—especially as they begin to penetrate more strategic and interaction-heavy functions like customer service, sales, and marketing support, and procurement.

### SSCs are breaking new ground:



#### Across functions



of shared services centers (SSCs) are supporting two or more functions



are supporting more than three functions



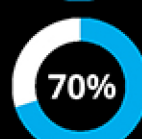
plan on increasing the number of functions in SSCs within the next three to five years



#### Across geographies



of SSCs have global coverage—up from 21% in 2017



global coverage for companies with revenue \$25B+



of new SSCs begin as a global delivery model—up from 8% in 2017



#### Areas of impact

##### Beyond cost savings:

While cost of services consistently ranks #1 in terms of factors important to business unit customers, reacting to business unit requests (#2) and timeliness of response (#3) rank highly as well.

##### Beyond transactions:

While transactional processes remain the predominant type of work performed by SSCs, deployment of strategic and interaction-heavy functions (such as procurement and customer service) demonstrates "upstream" growth in scope. The following functions have seen the largest increases:

**Procurement** (14% increase over 2017)

**Customer service** (33% increase since 2017)

**Sales and marketing** (35% increase over 2017)

**Supply chain/manufacturing support** (33% increase since 2017)



#### SSC governance models are getting more strategic, with multifunctional models such as global business services (GBS) on the rise

Resources in **50%** of shared services organisations report to a GBS leader as opposed to a functional leader, a trend that continues from 2017.

**52%** of organisations consider their collection of SSCs to be part of a global business services (GBS) organisation.

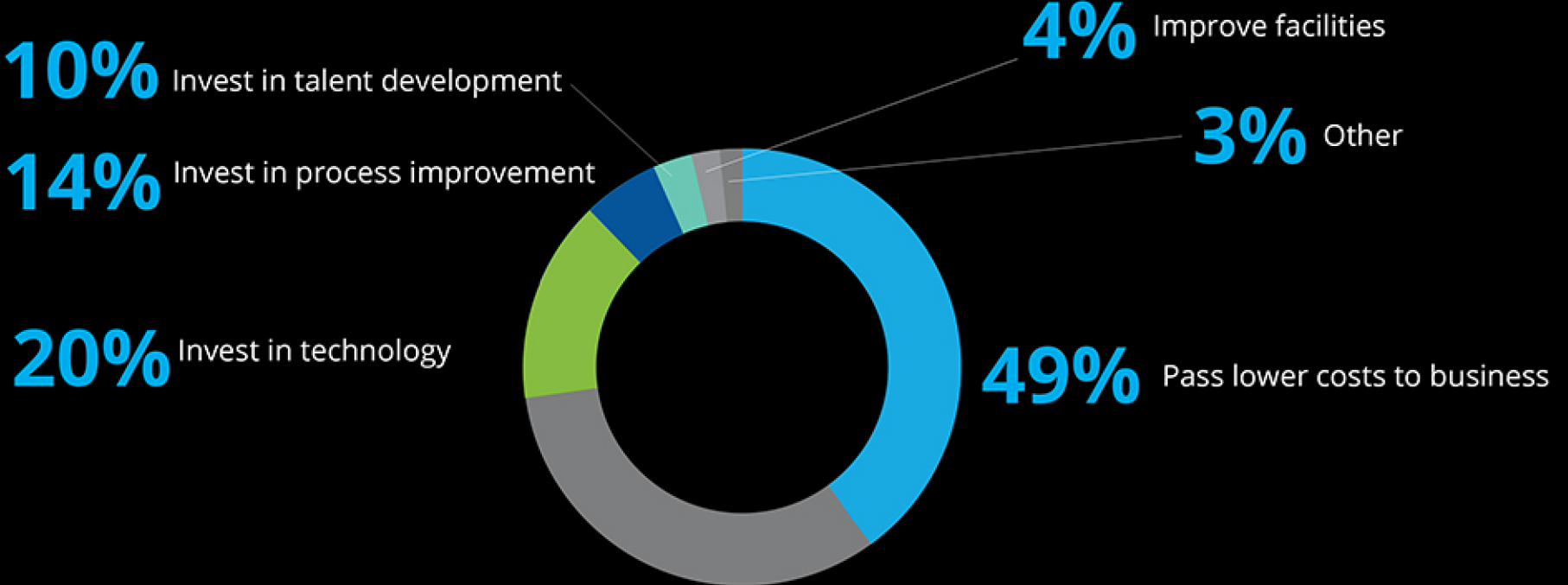
**Cost efficiency** and **business value** remain the two most important considerations when making decisions around SSC or GBS strategy and investment.



#### In this environment of expanded reach and value, payback periods are decreasing

**80%** of respondents recovered their investment of a new SCC implementation within first three years; 50% within two years.

#### How do respondents use the savings generated by SSC productivity improvements?



#### Rapid adoption of digital technologies positions SSCs for even greater efficiency and impact

**90%** of respondents agree or strongly agree that increasing digital capabilities is fundamental to achieve SSC and GBS objectives. Cloud is the most widely employed digital technology by SSCs (**68%**), with robotic process automation following close behind (**64%**). **53%** plan to significantly increase use of robotics in the next 3 to 5 years; **49%** plan to significantly increase focus on digital experience.



#### And an increased focus on the workforce is driving new strategic decision making

There's a fivefold increase in respondents measuring labour quality as a metric when considering a location for a new SCC (**34%** in 2019, up from **7%** in 2015).

Focusing on development of a strong culture has been the No. 1 method used to attract and retain talent (**72%**).

#### Contact us:

##### US

**Jean White**  
Global Business Services Lead  
Deloitte Consulting LLP  
jwhite@deloitte.com

**Brad Podraza**  
Managing Director  
Deloitte Consulting LLP  
bpodraza@deloitte.com

##### Ireland

**Daniel Gaffney**  
Partner - Consulting  
+353 1 417 2349  
dgaffney@deloitte.ie

**Alan Flanagan**  
Partner - Consulting  
+353 1 417 2543  
aflanagan@deloitte.ie

**Shane Mohan**  
Partner - Consulting  
+353 1 417 2543  
smohan@deloitte.ie