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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, and procurement.

SSCs are breaking new ground:

Across functions

63% of shared services centers (SSCs) are supporting two or more functions

46% are supporting more than three functions

83% plan on increasing the number of functions in SSCs within the next three to five years

Across geographies

59% of SSCs have global coverage—up from 21% in 2017

70% of SSCs of companies with $25B+ in revenue have global coverage

16% 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 "up-stream" growth in scope. The following functions have seen the largest increases:

Procurement (**14%** increase over 2017)
Customer service (**33%** increase over 2017)
Sales and marketing (**35%** increase over 2017)
Supply chain/manufacturing support (**33%** increase over 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.

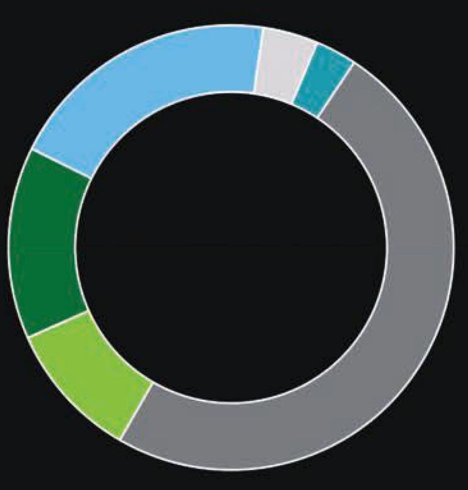
52% of organisations consider their collection of SSCs to be part of a global business services (GBS) organization.

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 SSC implementation within first three years; 50% within two years.

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



4% Improve facilities
3% Other
49% Pass lower costs to business
20% Invest in technology
14% Invest in process improvement
10% Invest in talent development

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 SSC (**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%**).

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