RESEARCH & ANALYTICS

State of the Shared Services Industry in Latin America:

Current Outlook 2025

Introduction

Latin America's shared services and global business services (GBS) landscape is transforming at pace. Once seen primarily as a nearshore cost optimization opportunity, shared services in this region have evolved into strategic growth enablers, innovation hubs, and talent incubators. As organizations seek greater agility, improved customer and employee experience, and stronger data-driven outcomes, shared services are stepping up, often playing a strategic role in enterprise transformation. We see this trend playing out in Latin America (LatAm) just as it is across other regions.

Based on data polled from shared services leaders across the LatAm region in H1 2025, this report examines the current state of the shared services industry in this region, and outlines four key pillars shaping the future of shared services in Latin America:

1. **Digital Transformation and Intelligent Automation**
2. **Talent Retention & Upskilling**
3. **Customer Experience as a Strategic Imperative**
4. **Data Management & Performance Measurement**

Global Editior

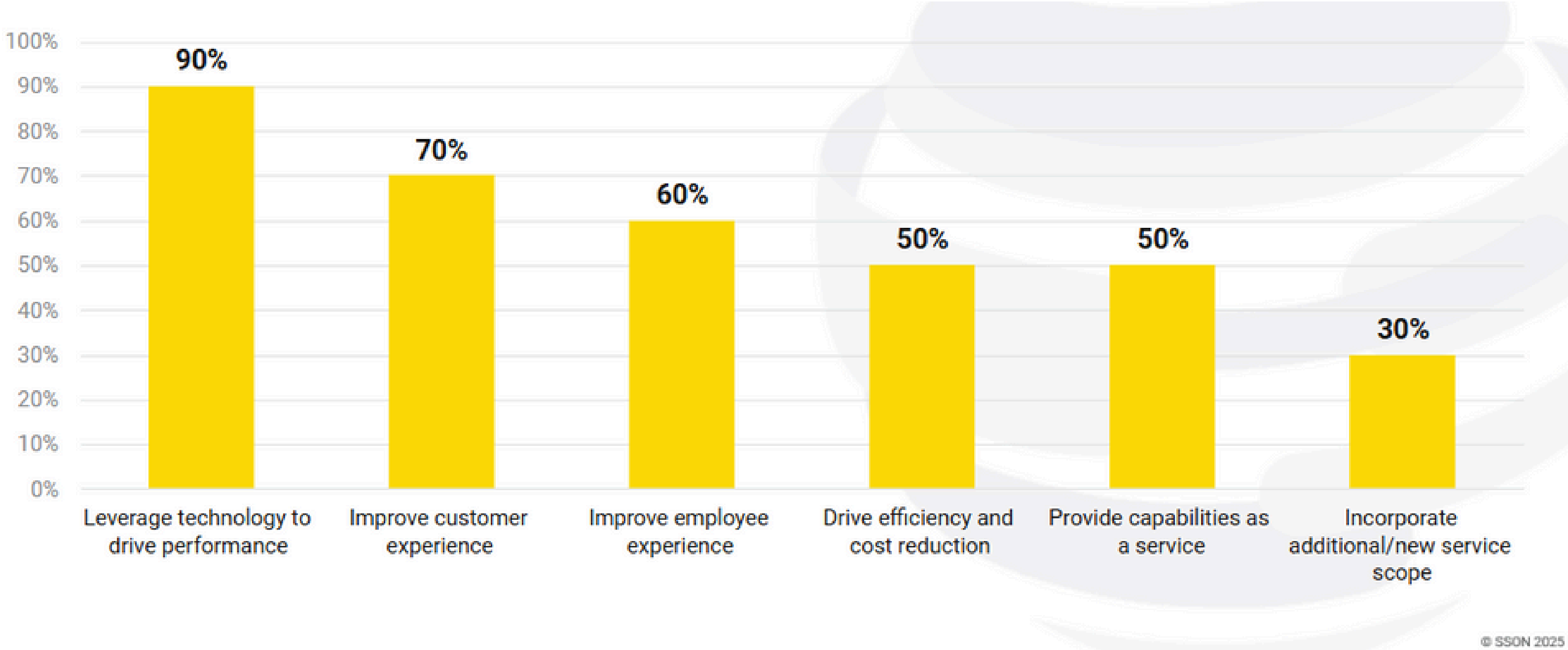
Barbara Hodge

SSON Research & Analytics

1. Digital Transformation & Intelligent Automation

Digital transformation is no longer an aspiration; today, it is a core strategy. This is reflected in our survey data, which shows the top strategic priority for LatAm shared services is leveraging technology in order to drive performance. Today, that performance is being given a boost by intelligent automation, but we already see generative and agentic AI taking center stage in discussions. 50% of respondents report only limited integration of AI into shared services to date, however, and only 10% report extensive integration. The opportunity for scaling digital maturity is thus substantial, and still way off its potential, although LatAm is not significantly lagging other regions across the globe in this respect.

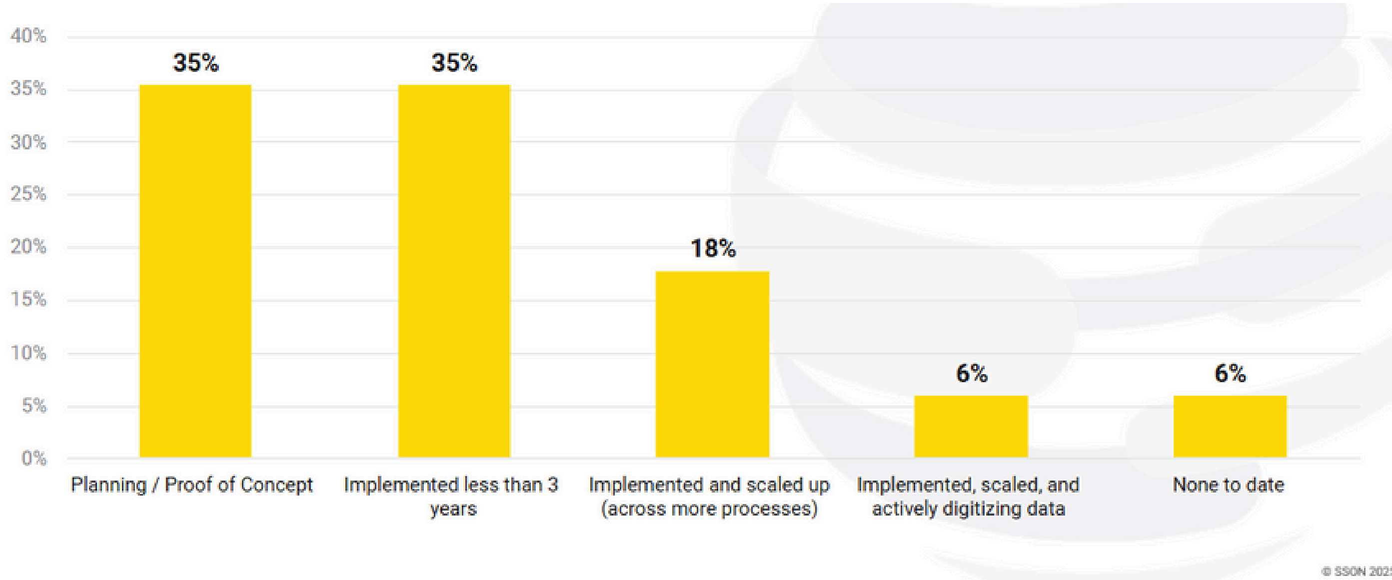
Considering your forward-looking strategy, what are your primary goals over the next five years?



Automation Maturity Is on the Rise

Across LatAm, 59% of shared services leaders rate their automation level as medium (defined as 26-50% of work automated), with 11% citing high levels (51-75%) of automation. Encouragingly, many are moving beyond RPA pilots: A quarter of respondents have scaled automation across multiple processes, and some have progressed to actively digitizing data in support of further expansion.

What best defines your current stage of intelligent automation?



The data also shows a growing investment in AI (including generative). These expansions emphasize the enormously digital ecosystem shared services operate within. Today, across Latin American shared services, this ecosystem is characterized by data analytics, cloud, and service optimization tools. There is also significant commitment to data visualization and workflow management. In addition, more than half the respondents are prioritizing some form of workforce optimization solution, recognizing the increasing impact of digital employees. Other areas of significance include data mining, business process management, and intelligent document processing.

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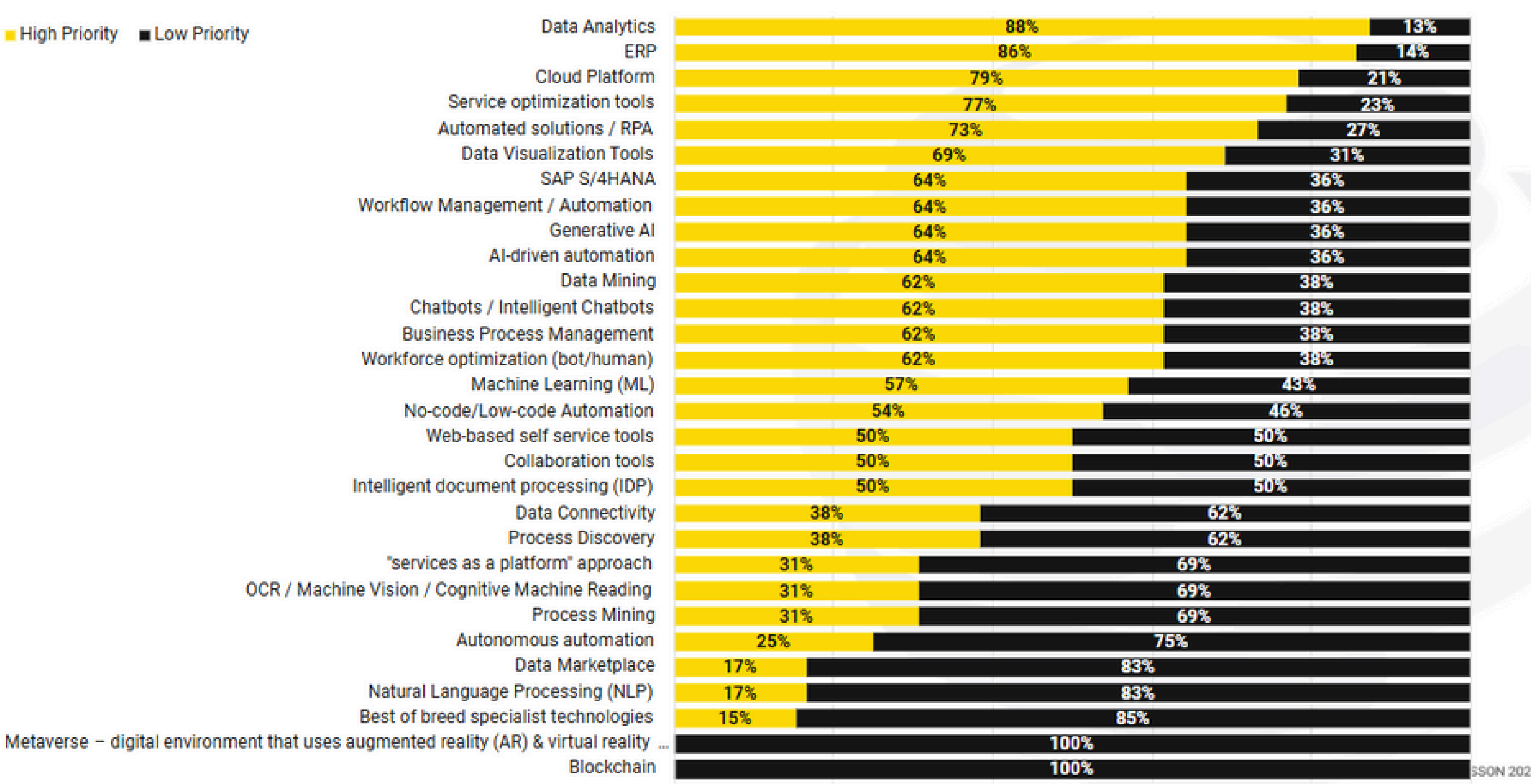


Half of the LatAm shared services respondents currently operate a hybrid AI model, with a centralized Center of Excellence collaborating with AI experts embedded within functions. Although this structure supports governance while accelerating experimentation and deployment, it falls short of the more advanced model whereby an AI Center of Excellence team is set up separate from other functions. As of today, only 20% of Latin American shared services have advanced to this model.

Key Challenge: Integration Barriers

Despite high ambitions, the LatAm region still struggles with integration issues: 30% cite lack of leadership support, 20% point to lack of process standardization, and a similar segment cites fragmented ERP landscapes. Other challenges include skills gaps and lack of data integration. These challenges are not insurmountable, however. The digitization wave is rolling on and shared services cannot ignore it, especially as awareness around digital technology is building and there are plenty of vendors eager to support integration.

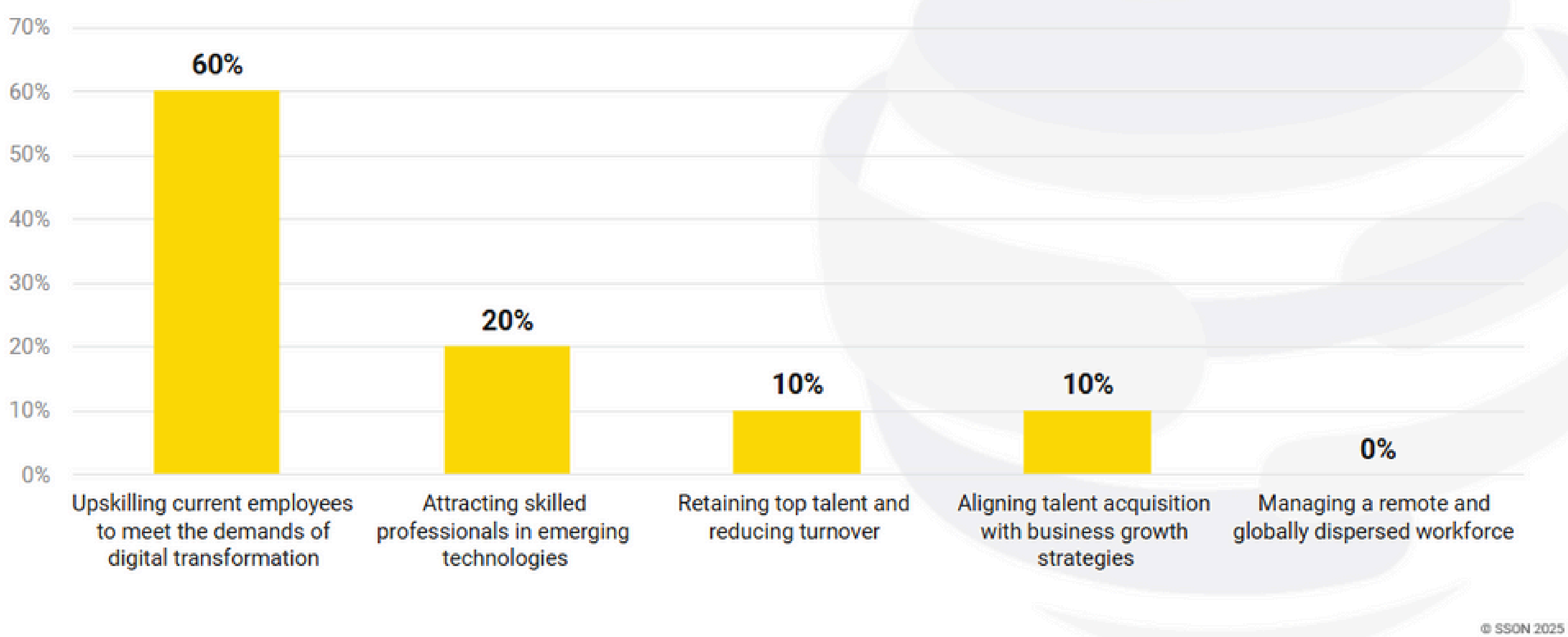
> **"30% cite lack of leadership support; 20% point to lack of process standardization."**
> - SSON Research & Analytics

2. Talent Retention and Upskilling

Talent is under the spotlight as new skills are in demand, shared services locations continue to heat up, inflationary pressures create pressure on center leaders to improve performance, and digital capabilities become a core differentiator for shared services.

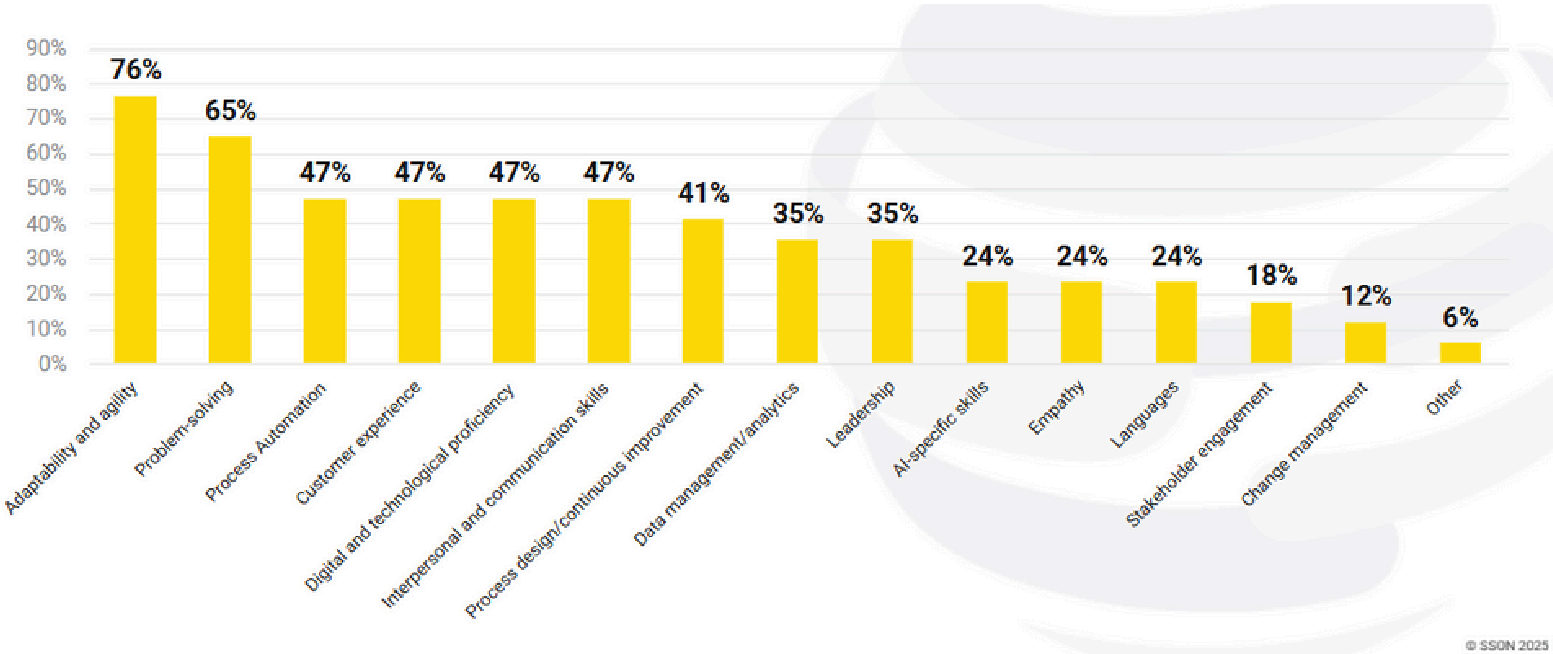
Evolving Workforce Needs

It's not surprising, therefore, to see 60% of respondents listing **upskilling employees to meet the demands of digital transformation** as their primary talent challenge, especially as **skills & capabilities** are still considered the most effective lever in process optimization. Leaders are seeking to build adaptable, tech-savvy teams that can problem solve, leverage automation, understand analytics, and bring an innovative mindset to the table.



Top skills being prioritized include adaptability & agility (76%), problem solving (65%), and customer experience (47%). It's notable that these are all "soft skills" that come into play in meeting customers' expectations and in relationship management. On the technical side, the skill most respondents cite as an absolute priority is linked to AI: Across the board, this is the opportunity shared services leaders want to crack this year.

What are the top skills you are prioritizing right now, in terms of recruitment and training?



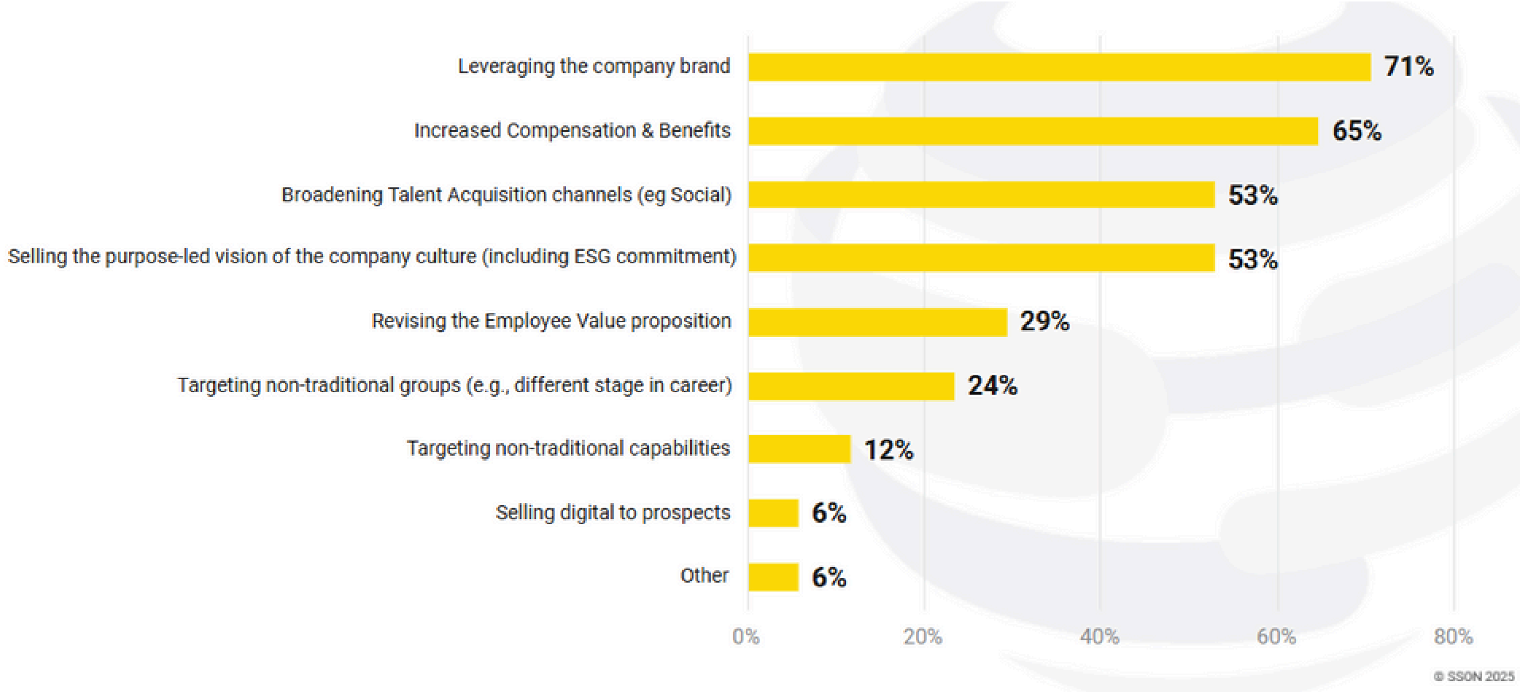
Addressing the Skills Gap

While lack of time, budget constraints, and resistance to change remain real hurdles, 60% of respondents are proactively addressing the skills gap through continuous learning and innovation, choosing to build up existing talent rather than rely on recruiting talent with needed skills externally (20%).

Recruitment Strategies Are Shifting

Shared services leaders in LatAm are adapting to the new workforce reality, actively leveraging their company brand to attract talent, or recognizing the need to meet compensation & benefits expectations in order to attract the talent they need. Others are selling the purpose-led vision of company culture alongside broader talent acquisition channels.

What efforts are you making to attract talent in general?



Gen Z expectations are also reshaping workforce models. Remote work, flexible hours, and an inclusive approach are important in attracting this demographic. At the same, time there's recognition of their demand for skills training and longer-term careers.

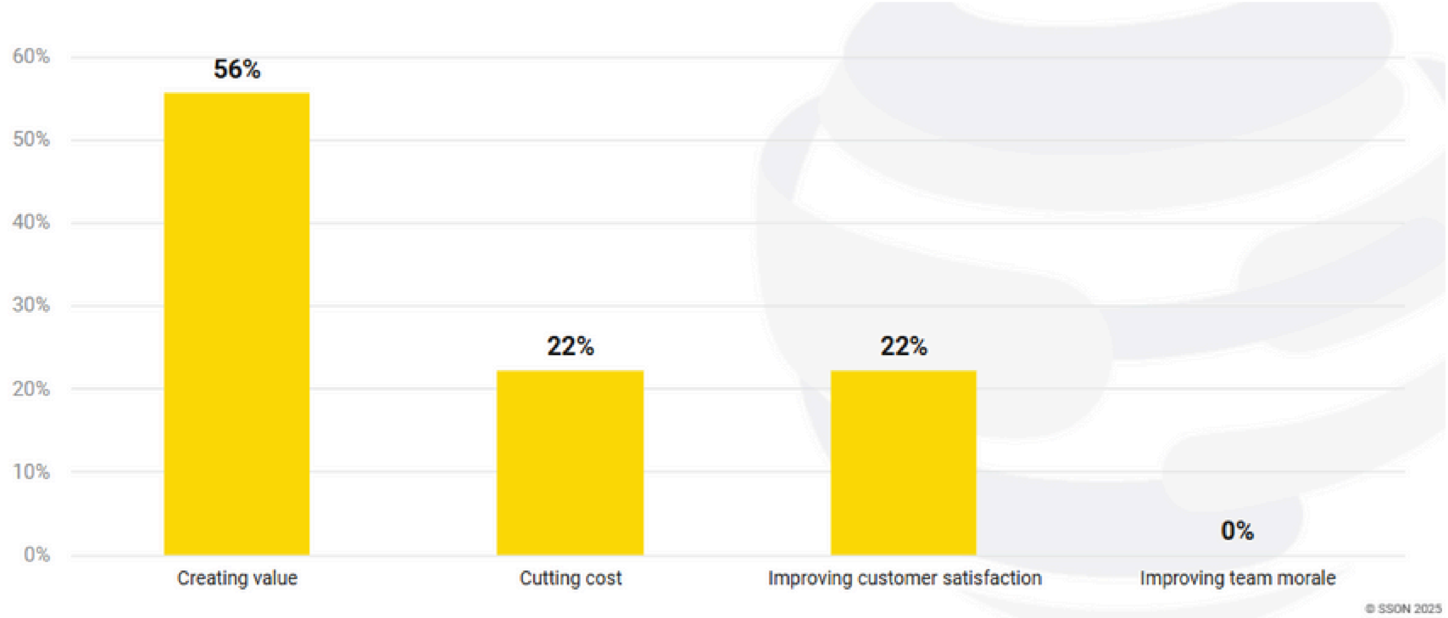
3. Customer Experience as a Strategic Imperative

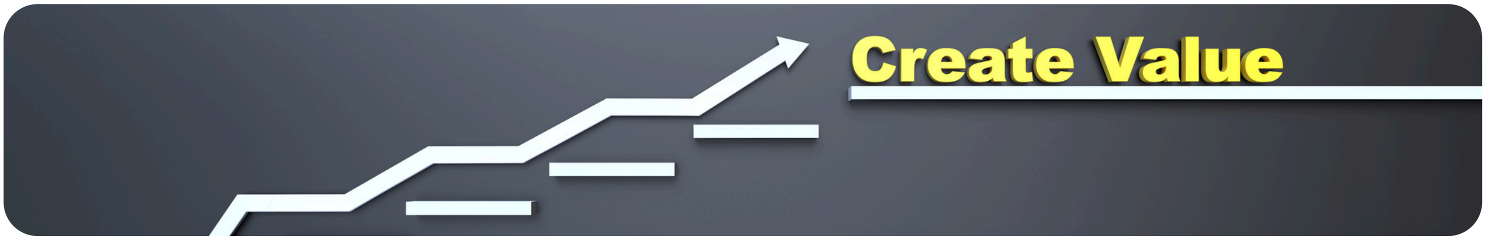
Shared services in Latin America are redefining success around customer satisfaction, not just service-level adherence.

Rising Focus on CX

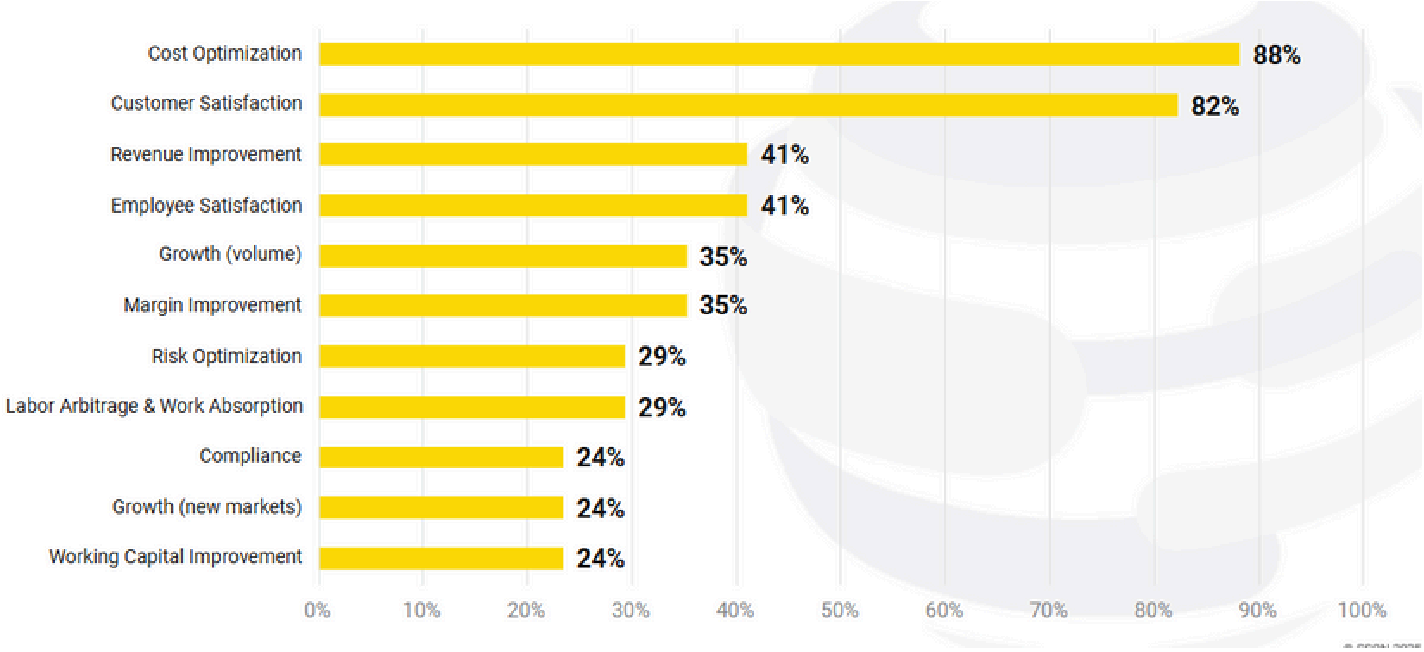
Forty-five percent of shared services in the region now include customer experience as a strategic target. In addition, while respondents report that the greatest recognition they receive from customers is for creating value, this is followed by improving customer satisfaction, which ranks equal with cost-cutting in terms of kudos. If we dig further into the definition of "value", we see cost and customer satisfaction as two leading factors, emphasizing the importance of focusing on the customers' experience.

What has earned you the biggest kudos/show of appreciation from your customers (the business)?





How do you define "value" in your SSO/GBS?



Experience-Driven Metrics

Across the region, a shift from SLA metrics toward experience-based measures is underway. To successfully enhance customer experience, respondents cite:

Personalized service offerings

Continuous improvement

Technology investment

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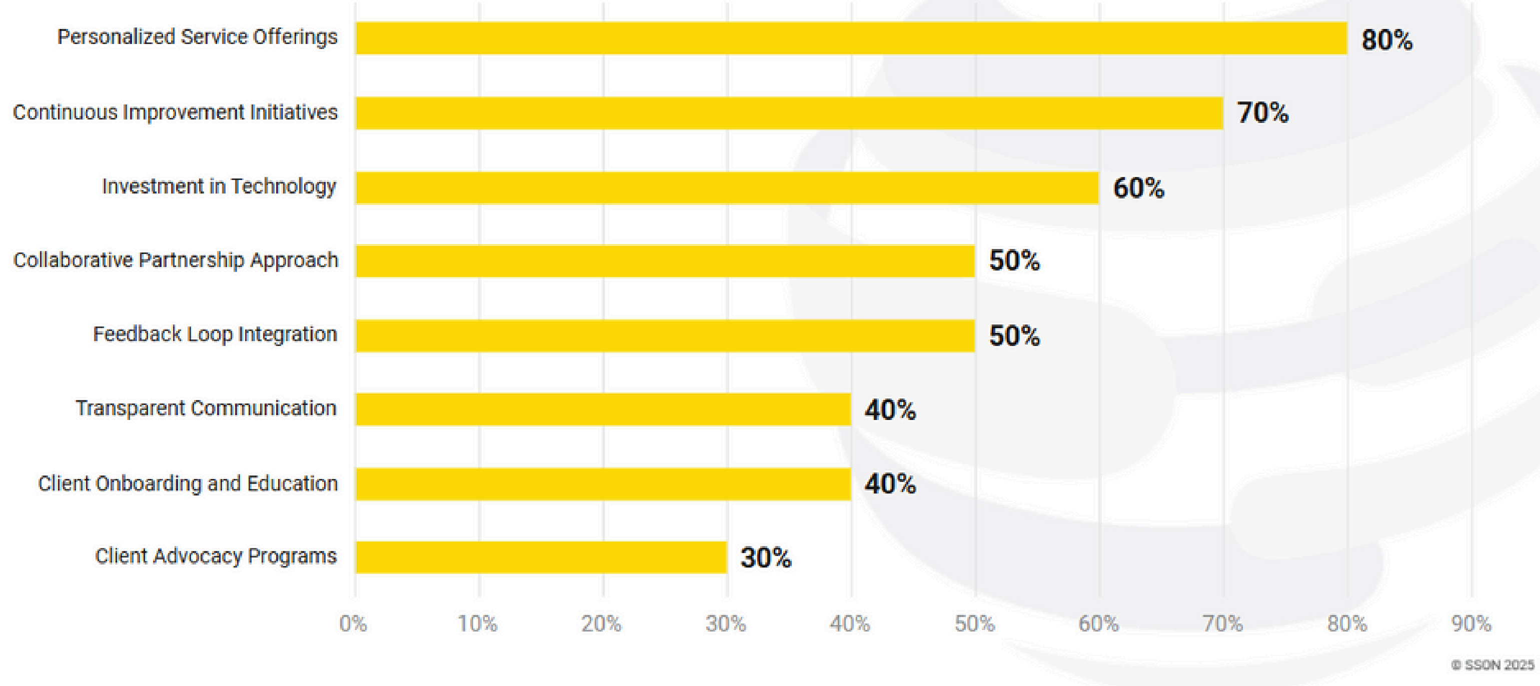
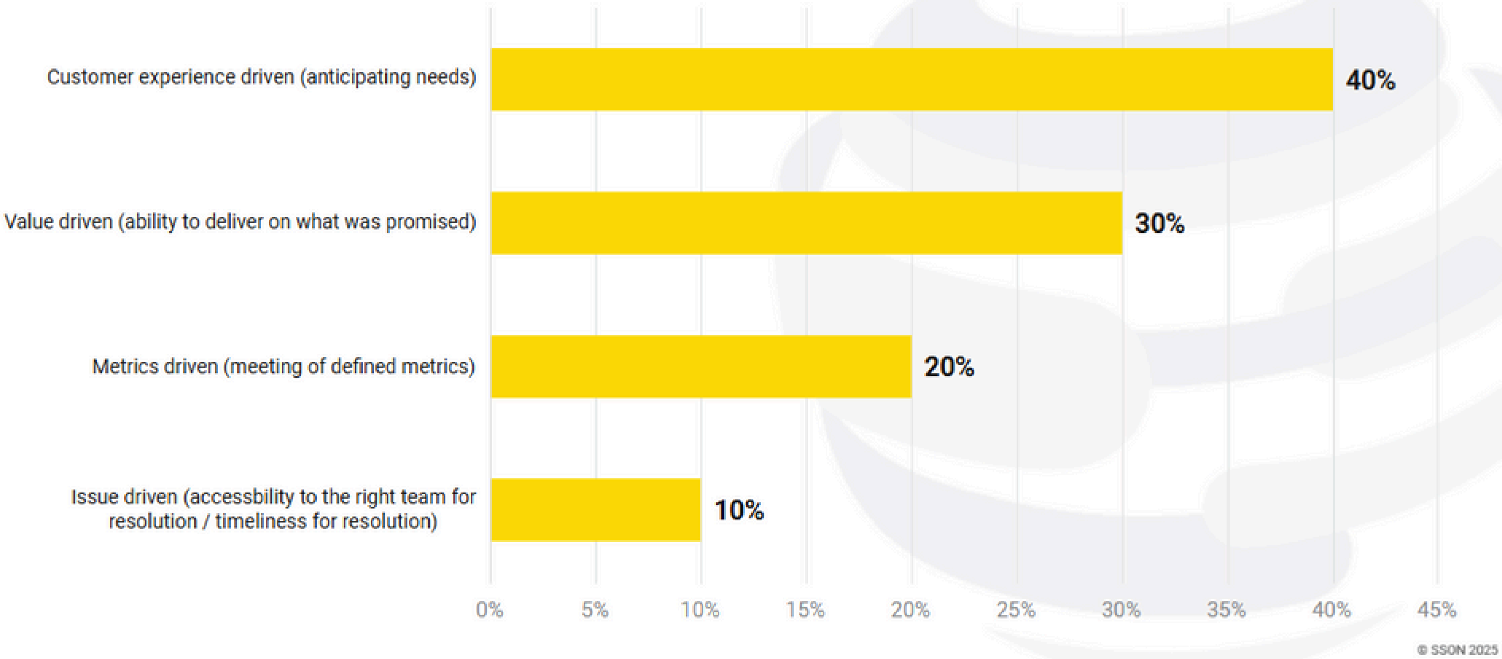


Half the respondents measure customer satisfaction through Net Promoter Score (NPS), while others use client feedback loops or CSAT metrics. The dominant theme of feedback, based on respondents' experience, links to anticipating customers' needs or delivering on promised value.

What is the key theme of client feedback regarding GBS delivery?

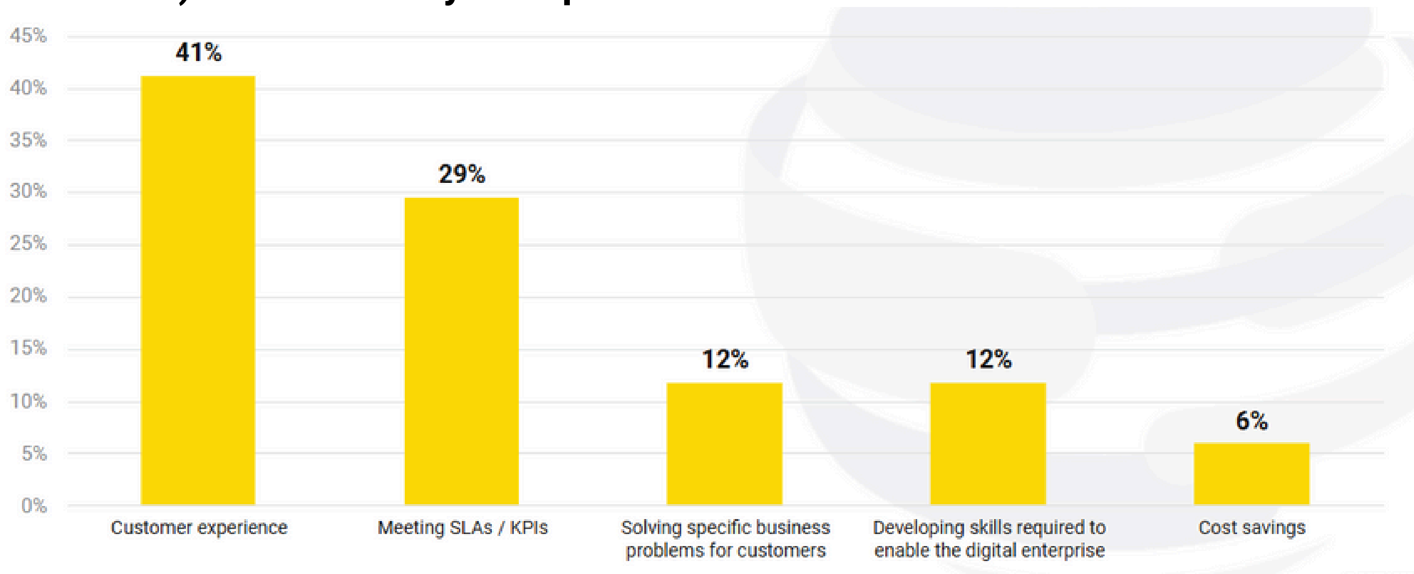


Digital tools, including self-service portals, chatbots, and collaboration platforms, are also helping to elevate experience, though use remains inconsistent: Only 50% of survey participants consider self-service tools a high priority.

What Defines Customer Centricity?

Shared services leaders define “customer centricity” mainly in terms of experience, but 12% emphasize problem solving, in addition. This reflects a more holistic, partnership-driven mindset emerging across the region.

What does customer centricity' (from the perspective of your business customer) look like for your operation?



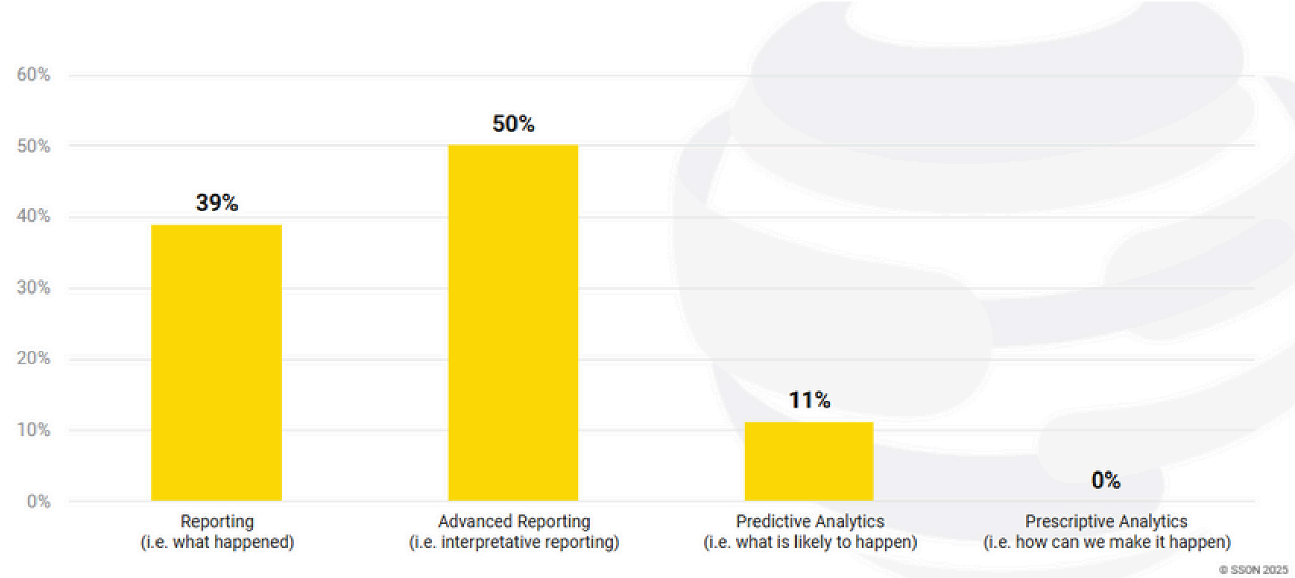
4. Data Management and Performance Measurement

Gen Z expectations are also reshaping workforce models. Remote work, flexible hours, and an inclusive approach are important in attracting this demographic. At the same, time there's recognition of their demand for skills training and longer-term careers.

Analytics Maturity Growing, But Not Fully Realized

Half of the respondents rate their analytics maturity as advanced reporting (i.e., interpretative reporting), which is an improvement on the 39% that are still focused on historic reporting. As of today, while only 11% of LatAm shared services are using more future-focused, predictive analytics, this nevertheless indicates a positive trend.

What best describes the analytics maturity of your SSO/GBS?

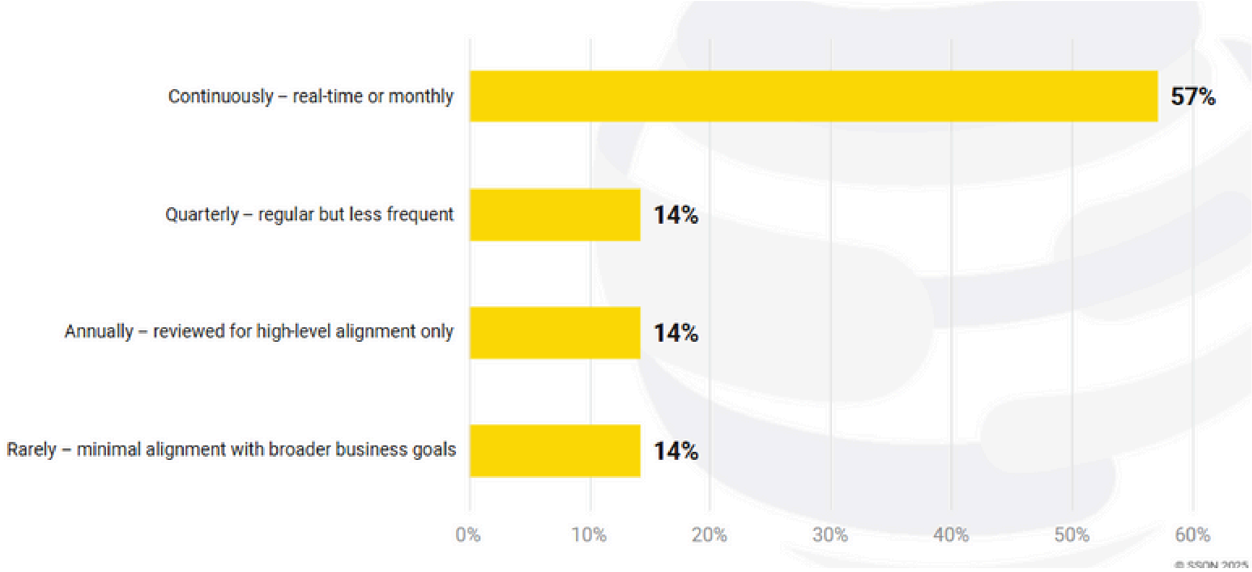


Where analytics are used, the biggest impacts have been in Procure-to-Pay (47%), Customer Engagement (29%), and Process Analysis (24%). Less than 30% of respondents confirm that they are using analytics to drive top-line growth, suggesting a gap between capability and execution.

GBS as a Strategic Data Partner

Across the board, leaders are working to evolve data management from operational tracking to strategic asset utilization. Fifty-seven percent report reviewing metrics at least monthly, if not continuously, to align with enterprise growth goals – for example, revenue or profitability.

How often are GBS metrics reviewed to ensure alignment with broader, growth-oriented enterprise goals like revenue growth & profitability?



Encouragingly, 29% say their teams leverage data specifically as a strategic asset, rather than use it mainly for operational improvements – a clear sign of GBS maturing into a business intelligence partner. In addition, the technology investment priorities cited above (AI and generative AI in particular) are aligned with the growing role of data in enabling predictive decision-making, performance transparency, and automation integration.

Conclusion: A Strategic Future for GBS in Latin America

The Latin American shared services industry is no longer playing catch-up. Instead, it is becoming a proving ground for digital transformation, customer-centricity, and talent development.

The majority (80%) of shared services leaders in the region plan to expand their service scope or geographic reach in the next year. Delivering value is becoming a priority for these leaders, and, as we have seen above, the definition of value is highly impacted by customer satisfaction.

While there are still challenges to overcome, from fragmented systems and skills shortages to a gap in future-facing analytics, Latin American shared services organizations are stepping confidently into a more strategic role, helping to shape enterprise growth, agility, and digital capability.

As we look toward 2026 and beyond, the question for leaders is not whether shared services can deliver strategic impact, but how fast they can scale their success.

Latin America: A Strategic Nearshore Opportunity

As demand grows for more complex, end-to-end service delivery, enterprises are turning to Latin America for its strong nearshore advantages like time zone alignment, cultural affinity, and access to skilled talent. North American companies, in particular, are expanding into the region to diversify their outsourcing footprint and reduce risk.

According to a recent SSON R&A report, 84% of Latin American shared services support North America, and many are also reaching into Europe (33%) and Asia (16%) thanks to digital capabilities.*

WHAT MARKETS ARE YOUR SHARED SERVICES/GBS/ OUTSOURCING OPERATIONS IN LATAM SUPPORTING?

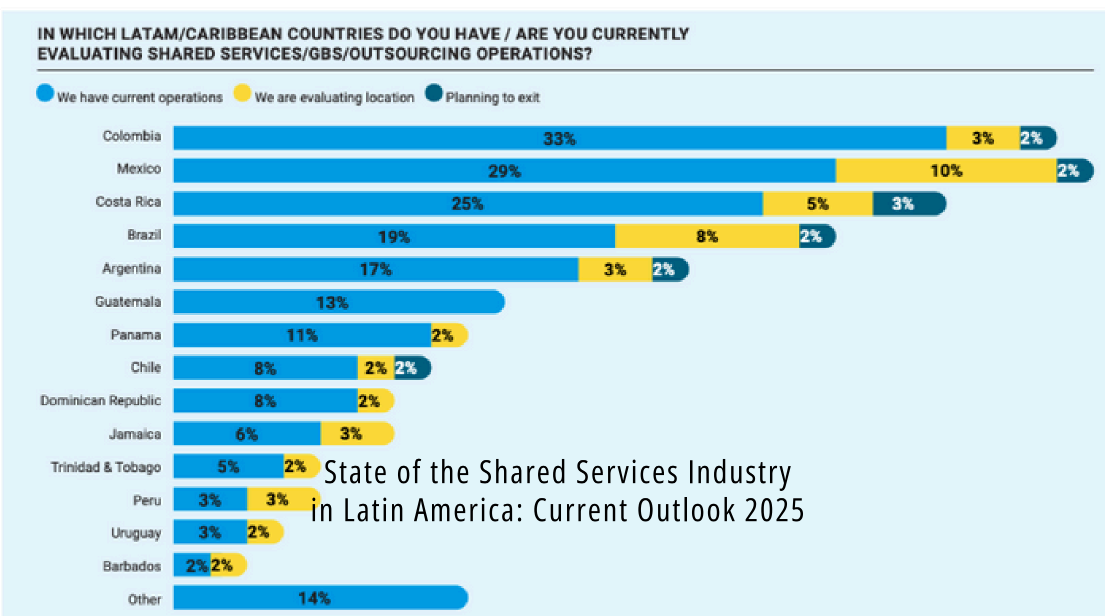
	North America (USA and Canada)	Latin America	Europe	Asia
Supporting	84%	81%	33%	16%
Considering	5%	3%	6%	3%
Total	**89%**	**84%**	**39%**	**19%**

Source: 2024 State of the GBS & Outsourcing Industry in Latin America

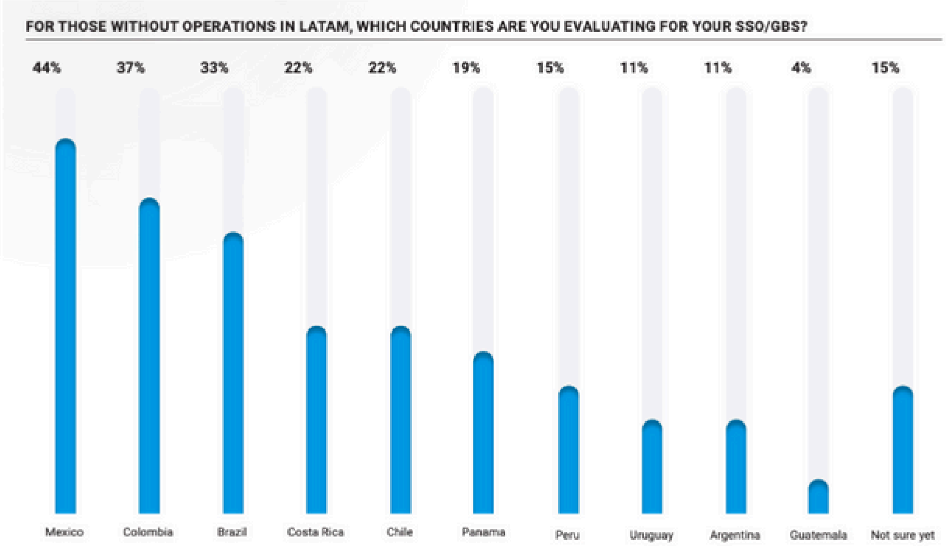
The most popular Latin American locations are:

- **Colombia** (33%)
- **Mexico** (29%)
- **Costa Rica** (25%)

These countries lead due to geographic proximity to the U.S. and mature shared services ecosystems. **Brazil** (19%) follows, though it primarily supports its domestic market due to language, regulatory complexity, and other barriers. Other notable locations include Argentina, Guatemala, Panama, and the Dominican Republic.



Among companies not yet present in the region, **Mexico** is the top destination under consideration, followed by Colombia, Brazil, and Costa Rica.



Source: 2024 State of the GBS & Outsourcing Industry in Latin America

Top Regional Advantages

Companies already operating in Latin America cite the following as "very important" benefits:

- Same time zone (60%)
- Quality of talent (59%)
- Innovation mindset (44%)
- Ability to support complex processes (42%)
- Infrastructure reliability (40%)

Other benefits include lower turnover, ease of travel, English language proficiency, and strong cultural alignment. Key concerns, on the other hand, for more than half of current operators include currency fluctuations and wage inflation.

Future Growth Outlook

An overwhelming 96% of organizations plan to **maintain or expand** their Latin American presence, primarily by adding more processes, new functions, or serving new business units and geographies.

* ***2024 State of the GBS & Outsourcing Industry in Latin America****, published by SSON Research & Analytics and sponsored by Auxis.*

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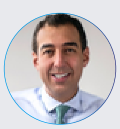

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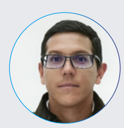

Ricardo Correa
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Opella

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