



2nd Shared Services in HIGHER EDUCATION

SSHE ADVISORY BOARD

A Proactive Approach to Shared Services

Ahead of the **2nd Shared Services in Higher Education Summit**, we sat down with some of the biggest influencers on our Advisory Board in order to gather their insight on the challenges they have faced in the industry. See what these executives had to say about topics ranging from ensuring continuous improvement to recruiting and retaining happy employees in your university.



Pam Gabel
Executive Director of the Shared Services Center
University of Michigan



Melissa Long Shuter
Executive Director of Business Operations
University of Louisville



Sarah Peri
Assistant Director of Operations & Outreach Academic Finance & Administration
Brown University



Shelley Prorise
Administrator, ABC School of Medicine Shared Services
University of Washington

Q1. What were your university's greatest shared services' challenges and how did it overcome said obstacles at x stage: 1) proof of concept/faculty buy-in, 2) launch, 3) implementation, 4) growth/expansion?

Pam: The University of Michigan's greatest challenge was famously the buy-in across all sectors of the university (faculty, staff, and students). Tensions and questions erupted publicly causing the entire project to be put on hold just months before the projected opening. After review the project was restarted with several changes to address the tensions. The most important change was a definitive focus on transparency and inclusion in the conversations and decisions regarding the implementation of the Shared Services Center.

Leaders from other sectors across campus formed a new advisory group, administrators from impacted units formed a new liaison group to review changes and prepare for the changes locally, staff that would be moving to the Center were invited to Q&A and preparation meetings, working groups were expanded to include unit end users as well as project team members while designing and testing the new processes, and a separate consulting firm focused on organizational design was engaged to assist the units to reorganize themselves based on the new processes. It was a massive change management effort but the result was improved processes and a reasonably uneventful go-live.

Melissa: Our greatest challenges were two fold, decentralized environment and a clear vision. Shared Services means many things across the enterprise and across higher education so clear messaging was critical. The business manager community had identified opportunity areas. A key stakeholder group was appointed to vet the identified areas and the recommended process by process approach. The key stakeholder group included a dean, faculty member, unit business managers and administrators.

University-wide town halls were presented in April 2016 to present the vision of a process-by-process approach and the predicted impact. Business Operations transforms processes and facilitates transactions with the highest levels of customer service. Focus on time impact rather than dollars saved was critical as was the fact that all processes are initiated and approved by the units. Representative workgroups were kicked off in June 2016. In July 2016 employees were reassigned to get the right people in the right seats. Centrally located space was also reassigned to Business Operations in July 2016.

The first process, launched in August 2016, was the onboarding of students and temporaries. Previously these employee populations were asked to complete a 36-page paper packet where they were repeatedly asked to write the same information over and over again. This manual process was then keyed into the PeopleSoft HR system. The department initiated process automatically populates information already know about the onboarding employee (name, address, etc.). An employee's personal data is populated with information already known by the university. The verification and updates to employee's data is mobile enabled. The I-9 verification process was centralized improving the associated internal controls. In the first six months over 1000 employees used the new onboarding process with a satisfaction rating of 87% (rating by both the requesting departments and the employees).

The second process launched was a new web-based timesheet for hourly employees. This capture, calculate and report system assures that all time is calculated consistently. The solution was programmed, tested and soft launched in an 8-week window with the full university-wide launch on November 25, 2016. The next big evolutionary step for the web-based timesheet will be to feed the collected and verified data into the enterprise system, eliminating the data entry component.

Current staffing in Business Operations is 12 employees and expected to double over the next year as new processes are rolled out. Business Operations started with a two year plan and is positioned to affect processes such as travel and expense, personnel actions, onboarding additional groups, expense transfers and reconciliations.

Sarah: Brown is still evolving its shared service model. We are in, what is effectively our third iteration of an evolutionary model of shared services and we hope it to be the most productive and efficient. This model now spans across both administrative and academic units housed under one senior leader whereas before, Brown had separate shared service models under the academic senior management and the administrative senior management.

One of our greatest challenges is, at this point, is making sure all constituents are being considered. Bringing many shared service leaders together helps to facilitate this but how do we make sure we are adding value to our core mission goals while making sure the day-to-day business is being completed both efficiently and productively? How do you restructure processes that didn't work in the past and continue to get buy-in from the end users?

Shelley: Faculty buy-in was our greatest challenge! Trust is not something that just given it, it is earned. Through consistent communication (sharing information about successes and challenges), creating partnerships and providing quality work products, ABC was able to earn the trust and support of the Faculty one proposal at a time. We learned not to take short cuts when growing services or expanding into new departments. Each group of Faculty/Staff requires time and energy to understand their unique culture and create a relationship that is unique. Building unique relations allows a platform to standardize work.

Q2. If there was something different you could have done from the beginning of your shared services' journey, what would it have been and why?

Pam: There are two things that I would have done differently at the beginning, the first is to have anticipated the change management and communication efforts needed to give the project the transparency and communication needed to ease concerns, gain buy-in and get full pictures of the processes up front.

The second thing I would have done differently is focus on the value of shared services in its roles related to compliance, risk mitigation, staff empowerment and engagement, and continuous improvement and moved potential cost savings to an eventual outcome, instead of the driver for change. By making this change we can focus on being successful and driving productive, meaningful change that in the end will naturally lead to cost savings and employee retention.

Melissa: I would have been clearer about the Business Operations name and the building of enterprise solutions. Initially the project launched as Belknap Campus Shared Services (Belknap is one of three University of Louisville campuses). The workgroups focused on Belknap Campus data. While Health Sciences Center campus staff were part of the workgroup the focus was initially on Belknap campus.

With the launch of the first process, onboarding students and temporaries, it became clear that an enterprise solution had been developed and should be launched university-wide. For both the departments and the central offices, clarifying and refining processes has been a huge improvement over the varied and decentralized process approaches. Business Operations name was clarified in July 2016 when we opened physical space.

Sarah: Communication is key to any relationship. Since Brown's current model is a marriage of administrative and academic shared service units, communicating with leaders, staff and end users is

crucial to making our marriage work. As we continue to grow and evolve, we continue to learn about processes that are in need of our attention. Perhaps having even more focus groups with end users on what they saw as their biggest process issues, communications issues, or biggest time sink holes would have been helpful to document up front in order to create more buy-in from the ground floor.

I firmly believe you can never over-communicate when it comes to process changes, but I do find that it is important to strike the balance with time management and not get bogged down in details for too long.

Shelley: In a perfect world we would have had the shared service staff hired prior to mapping out our processes and creating the shared service center. Being fully staffed (or even over staffed) at launch and at times of growth is essential to retaining hard earned trust! Ensuring enough capacity for growth and busy times is crucial in the beginning.

Q3. What methods does your university employ to recruit, develop, and retain qualified and happy employees?

Pam: At the U-M SSC we are working hard to develop a culture that is focused on the needs, wants and hopes of administrative staff. We are concerned that each staff member has the opportunity to be successful and to achieve whatever next step they can in their career. To do this we have instituted several practices: developing 90 day training plans for new hires that both trains them how to do the job but also introduces them to the complex and sometimes different culture of higher education and shared services; offering robust monthly leadership training for all supervisors and managers focused on transactional management and people development skills; delivering quarterly leadership prep training for all senior associates focused on preparing them for the next evolution in their careers, offering numerous committee and task force opportunities, delivering basic LEAN training and skills for all staff which encourages sharing ideas and enable any staff member to own and feel the joy of leading a project to completion.

Melissa: Recruit - Right people in the right seats – Business Operations launched by reassigning staff in director positions, functional/process focused staff and customer focused staff. These initial staff brought a wealth of university knowledge and a willingness to build a new department.

Develop – Customer Service training was conducted with Re-Envision Consulting (Susan Leigh) for the full customer service and team lead staff at the silver certification level. Lead staff and directors also participated in the gold certifications. Directors further certified in the train-the-trainer program.

Develop and Retain - Values workshop – The Business Operations team identified the top five team values. Each of the identified values was then discussed in terms of good, better and best. These values are the bases of performance evaluations.

Develop and Retain - Morning huddles – Initially the directors and executive director huddled each morning to discuss the various projects and to keep pace with the large number of changes and new staff. Beginning in 2017, full staff morning huddles and 15 minute standing meetings were initiated. Staff has appreciated these meetings as an opportunity to ask questions and clarify understanding.

Develop and Retain – Staffing levels range from I, II, Sr., team leads, directors and executive directors. This ladder provides staff a path to excel.

Sarah: The best employees for a shared service center are going to come from areas where the work has been done, previously. Whether that is an internal or external candidate, it does not usually matter. A consistent schedule of 1:1 and group/team meetings is important so you get to know your employees on an individual basis as well as create a team comradery.

I encourage professional development whenever possible. One of the many advantages of working in higher education is the opportunity to take classes on just about anything! In addition, to communication and professional development it is important to reward. There are different methods for this and it is important to figure out what works best for your team and your University. We use recognition, free days off and symbolic tokens when our employees go above and beyond.

Shelley: Happy employees are essential to a shared service center. We are constantly striving for an environment/cultural that is supportive of employee engagement. Our staffing model changed after we were developed based on customer feedback. We believe that understanding the customer expectations helps to find the right people to help them.

Employee Engagement / Satisfaction

- We strive to help our employees feel challenged (but not too challenged). We have a performance driven culture that helps employees track and evaluate their work.
- We love to celebrate our success and relish our KUDOS. This helps our employees feel appreciated and helps us track our successes over time. Here is a snap shot of our KUDOS board where we post positive feedback
- The team developed a set of shared values that helps them to prioritize the needs of our customers.



Team Values

- We seek to understand our customers and focus on our shared success. We provide accurate, flexible, and responsive service with the goal of exceeding expectations.

Accountability

- We are proactive, reliable and trustworthy project managers who take ownership of projects from beginning to end.
- We produce accurate results by staying up to date on regulations, following best practices and continuously learning.

Effective Communication

- We believe that effective communication is the cornerstone to building strong relationships and trust.
- We demonstrate this by providing timely, concise, respectful, and transparent communication.

Continuous Improvement

- As a team we are empowered to change our processes and tools to create efficiencies and add value for our customers

Q4. How does your university's Shared Services Department/s ensure continuous improvement?

Pam: We utilize the LEAN in Daily Work methodology, which utilizes structured daily huddles to collect ideas, test out options and do experiments leading to broader changes, projects or whole new ways of processing. We also maintain a small Continuous Improvement team who assists with the

development of projects requiring IT assistance, so that our requirements are understood and our eyes stay focused on the goal of effort.

Melissa: Measure data – both process and customer service data is collected, assessed and improvements prioritized.

Launch – Solutions are launched with the key essentials and an enhancement list rather than waiting for all enhancements before launching. Delivering the enhancements within a specified period has built confidence with university and allowed for user-input as the final touches are added to solutions.

Sarah: It is important to continually meet with your customers and gain feedback in order to measure value added. Gathering data for metrics and providing a dashboard of information to senior leaders is equally as important. Providing opportunities for trainings, customer surveys and focus groups are additional ways to ensure continuous improvements.

Shelley: Continuous Improvement is a priority for the School of Medicine and one of the pillars of our organization. We use principles from Lean and Six Sigma to ensure that we continue to produce quality work, learn from our mistakes, and deliver what the customer values.

We have an idea board where staff can make suggestions/changes that will enhance their work, the customer experience, and/or save money and time. (I have lots of information on this if you need it).

We use specific methodology to deconstruct issues in order to learn from them. Issue or negative customer feedback results in an informal corrective and preventative action plan. We work hard to get at the root cause of the problem (root cause analysis or 5 whys) in order to make a lasting change.



Q5. After either speaking or attending one of our previous SSHE conferences, what were your top 3 Lessons Learned---and in turn you applied to your shared services operations?

Pam: My top lesson learned seems to always be that I am not alone in the effort and there are others who become compatriots and friends in this journey. Secondly I always hear reviews of software suppliers and what is working or not, and why other institutions made the choices they did and how they worked out. This is so important as a way of not having to redo work over and over again in sorting through the myriad of service offerings out there. Thirdly I usually hear about some process or procedure that someone is trying to solve a problem that is similar to one we have, and I take the idea and try it at home.

Melissa: We all share similar challenges. There is not a one-size fits all approach. You can never communicate enough.

Sarah: I learned so much at the Shared Service conference in DC this past November/December. Probably my most valuable learning moments were just in the small discussions that occurred in between sessions or in breakout groups. I learned of people's failures in their own shared service models and I watched them be OK with that. They learned and improved with each iteration. That is a valuable lesson as a leader.

I also learned that it is crucial for the success of your shared service model to gain constant feedback. The actions taken on that feedback is even more crucial to the longevity and success of your unit.

Lastly, reporting on your successes needs to be meaningful to the audience. If your University is one that is especially environmentally conscious, measure your savings not in dollars but in paper saved or energy reduction amounts.

Shelley: You cannot communicate enough with your customers. Partnership is key! And not just partnership agreements – Real partnerships! Create a robust governance structure including a faculty oversight committee if you have faculty as customers. Change is hard, but well worth it.



At the **2nd Shared Services in Higher Education Summit**, you can look forward to hearing from these Advisory Board members who will show you the ways on how to effectively integrate and expand an SSC at your institution.

View more about their speaking sessions in the [full event agenda!](#)

Three Ways to Register
www.SharedServicesHigherEd.iqpc.com
enquiryiqpc@iqpc.com
1 (800) 882-8684