



Chazey  
Partners



# 3 CORE FACTORS FOR EFFECTIVE SHARED SERVICES CHANGE MANAGEMENT

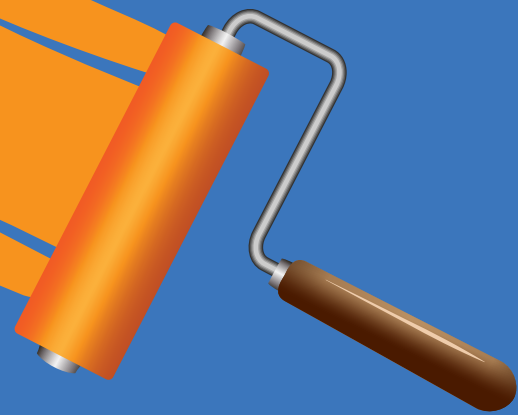


Time for  
**CHANGE**

# WHY CHANGE?

Change is a constant, given the shifts that external markets are constantly undergoing, and because businesses are always seeking new ways and strategies to support growth and profitability. Often, it's a simple matter of survival, with businesses needing to adapt to evolving markets and conditions in order to maintain their competitive position.

Any time you are promoting or pushing through a different way of doing things, change management is required to engage with and get all the various key stakeholder groups on board and smooth the transition. The best laid plans and most persuasive business cases can flounder and fail dismally – and publicly – as a result of mismanaged change. News stories are littered with examples.



# SHARED SERVICES = CHANGE

With businesses increasingly moving to a Shared Services based delivery model, the resulting implementation often involves and requires significant upheaval. In an ideal situation, the end user [internal business customer] suffers little to no inconvenience or interruption in service as a result of the handover. However, this requires laying the groundwork carefully, investing in appropriate training, and managing expectations. Effectively, you are targeting a transition that maintains business stability and supports company values while delivering the Shared Services business case. Bearing in mind that customers show a low tolerance for lengthy stabilization periods, the faster you can transition from A to B, the better. A robust Change Management framework will support you on this journey.

It is important to maintain contact with the client throughout all stages of transition. Initiate Change Management early and take a proactive approach to get results. Chazey's experience of delivering change across a multitude of industries and organizations has confirmed that early prioritization of Change Management is essential for developing, securing, and maintaining sponsorship and stakeholder buy in.

Figure 1, below, summarizes Chazey's best practice Design Approach and Methodology throughout the lifecycle of a Shared Services implementation.

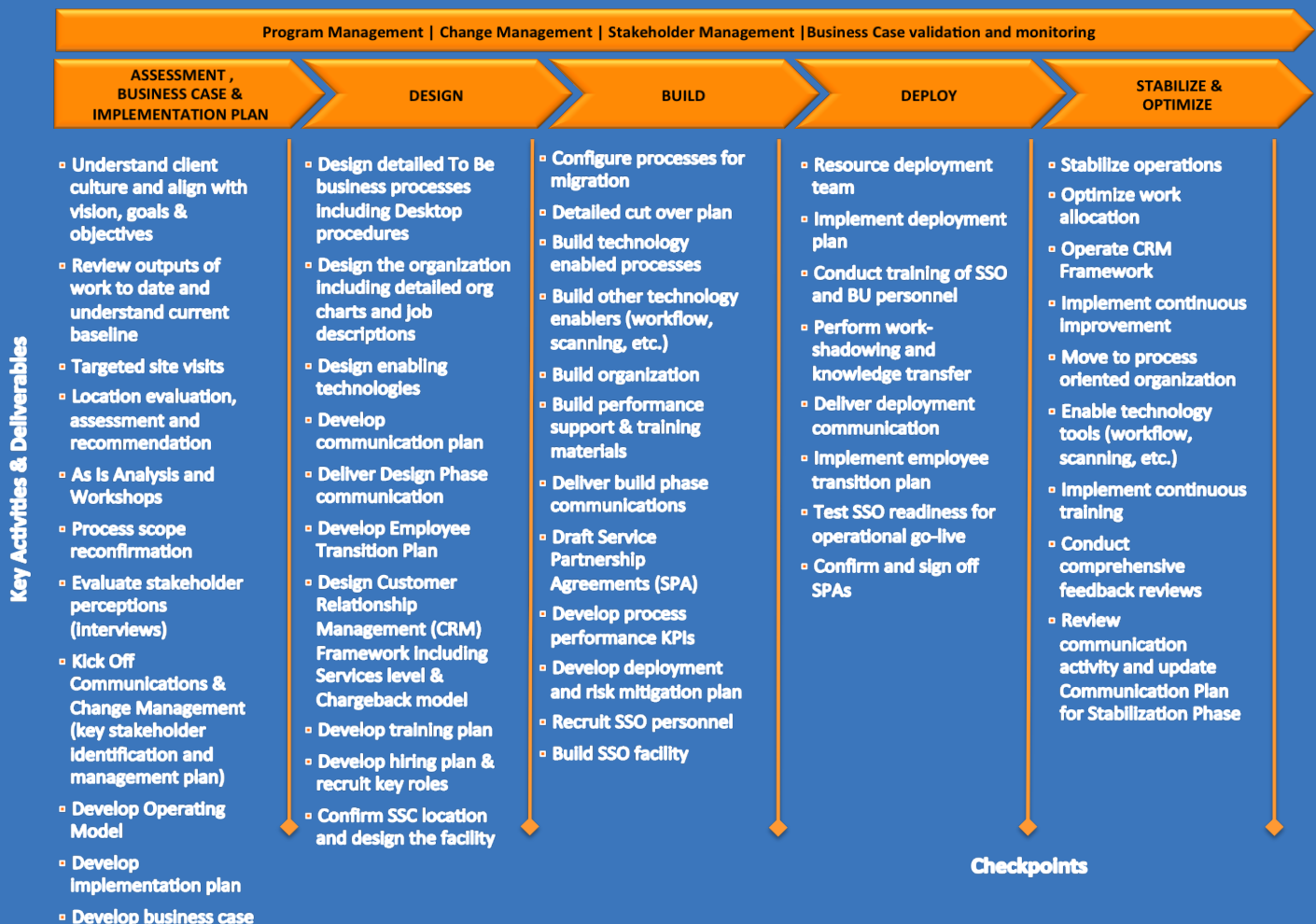


Figure 1: Shared Services Implementation Approach & Methodology

Noteworthy in this summary is the fact that Communication is highlighted in each of the five stages [see also “Communication Strategy” section, below] and that there is extensive engagement with internal users and customers through a range of techniques, including stakeholder interviews, workshops, transition plans, etc.

Some Core Factors for Successful Change Management are listed here:

# 1 Stakeholder Identification and Management

Stakeholder Identification and Management is a critical Change Management activity, and should be undertaken together with the client. It serves three related key purposes (see also Figure 2):

- a. It ensures that all key stakeholders for the project are identified.
- b. It determines the level of support for the project across the organization.
- c. It provides significant input to the Communication Strategy and Plan, based on awareness of stakeholders and their requirements.

## DRIVING SUPPORT ACROSS THE ORGANISATION - THE WINN MODEL



Figure 2: Effective Stakeholder Management

Stakeholders should also be evaluated as to their impact and potential influence over change, and the level of support they may offer to a project. The table below offers some tips in identifying your different stakeholder groups. Based on these considerations, you can plan appropriate communications campaigns for individual groups.

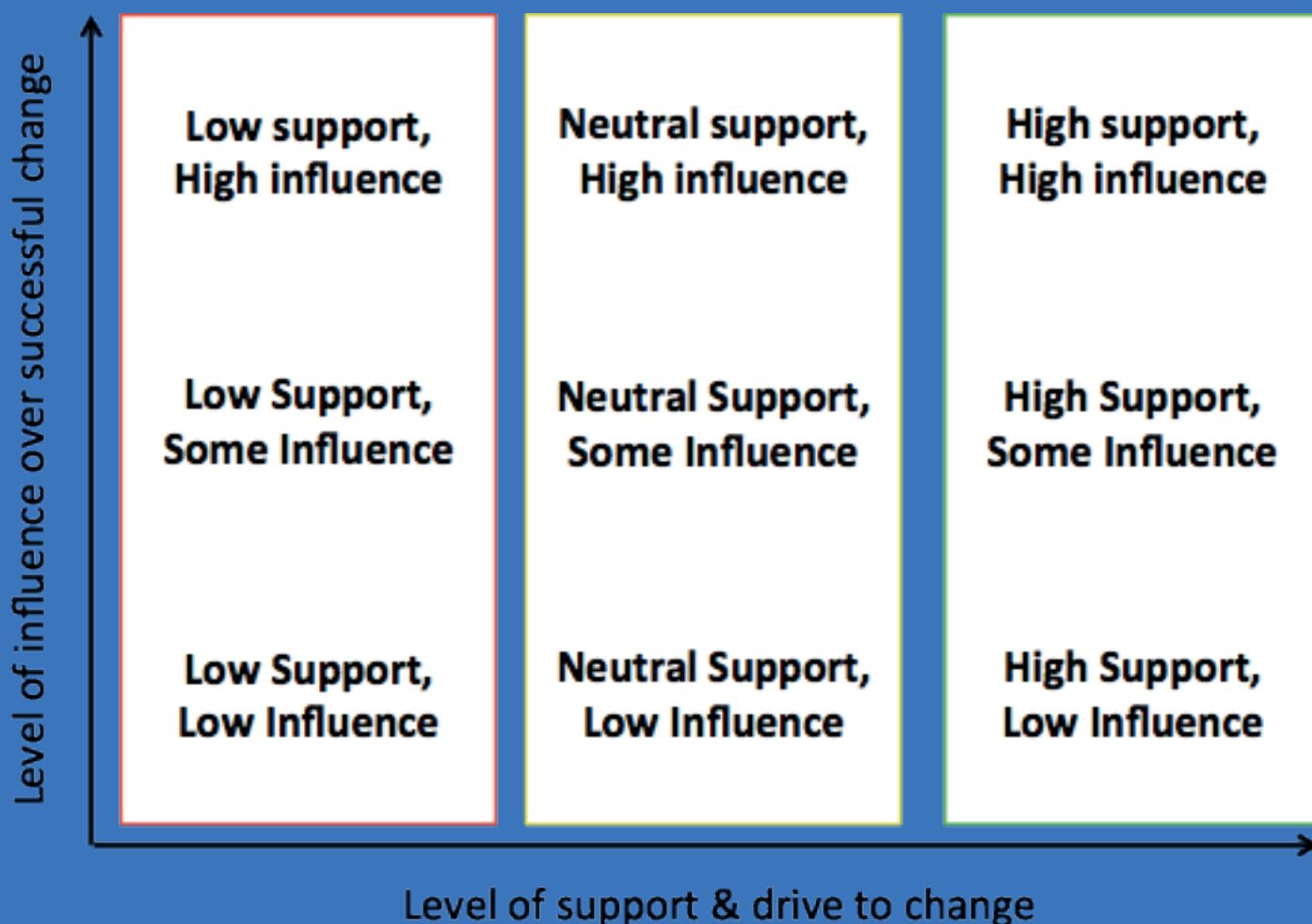


Figure 3: Stakeholder Analysis

[For more information on Stakeholder Identification and Management Templates, please email [enquiries@chazeypartners.com](mailto:enquiries@chazeypartners.com)]

## 2 Communication Strategy



Communication support is a constant requirement throughout a Shared Services project. A strong, consistent, and reliable communications strategy will support smooth transition, no matter how complex the process. Communication requirements will be driven by project activities, key milestones and the needs of key stakeholders, which will have been identified at the start of the project. In all communications, be clear about your purpose and intent; know which stakeholder audience you are targeting and what you aim to achieve with the communication; and ensure you are using the correct types and channels for communication.

A detailed Communication Plan should be developed and reviewed regularly to ensure it is effective and meets the needs of stakeholders. The Communication Plan thus provides a roadmap for messages, audiences, communicators, and channels during the lifetime of the project. It should be prescriptive about the timing of messages, aligning them with key project activities/dates. The Plan is a 'living' document, and so will respond to changing needs and circumstances. It should be updated with each new project phase, or as requirements change.

An effective and successful Communication strategy is based on remembering the “3 C’s”:

- 1. Communication:** this is the message you are transmitting, generally one way
- 2. Consultation:** the recipient can influence and impact the message, but you have the ultimate veto over the information and final outcome
- 3. Collaboration:** you and the recipient work together and neither has final control over the output. You “share” the final outcome.

As part of a best practice communications strategy, you should hold regular calls with clients, offer interactive forums where desirable, review the communications based on these meetings, distinguish between internal and external clients, and survey both client bases regularly (see also Figure 4, below):



**Be clear on your purpose/intent and use the right type of communication (remember the 3 C's):**

**Communication**

You own message, generally one-way information transfer

**Consultation**

Recipient can influence/impact message, but you have veto

**Collaboration**

You do not control final result

Figure 4: Communication Mechanism

[For more information on a Communication Audit Template, please email [enquiries@chazeypartners.com](mailto:enquiries@chazeypartners.com)]



# 3 Employee Transition Plan

The Employee Transition Plan sets out a recommended strategy and approach for transitioning the client to the new operating model while factoring in employee transitions as determined by the new model's needs. The plan's aim is to minimize risks to the business during transition, and support the deployment of employees into the new center(s), while also managing any redundancies or redeployments that arise as a result of the transition.

Specifically, the plan determines the impact on individual roles as a result of this change, considers legal implications, prepares for redundancy where required, plans redeployments where appropriate, and manages desired employee retentions.

The Transition phase includes recruiting and training, where necessary, to supplement existing skillsets. The Recruitment Plan determines the roles to be recruited, a timescale, and lists recruitment sources and options. A holistic training plan should be developed in collaboration with HR and the client, and should encompass process, technical requirements, customer service, line management development, and induction.

[For more information on Templates and Sample Employee Transition Plans, Recruitment Resources, Job Descriptions, a Competency Framework, sample interview questions and Training Plans are all available on the portal, please email [enquiries@chazeypartners.com](mailto:enquiries@chazeypartners.com)]





A stylized illustration of a workspace. In the top left, there's a white spiral-bound notebook with yellow lines and a yellow coffee cup with black coffee. To the right are a green fountain pen and a black pencil with a red eraser. A large red hand is pointing towards the center. In the bottom left, another red hand is visible. At the bottom, there's a black and green book with a red bookmark, a red hand holding a pen, and a pair of black-rimmed glasses. The background is split into blue and white geometric shapes.

## Summary

Change Management is commonly overlooked or granted only “nice to have” status – as opposed to recognizing that it forms a critical and vital enabler of strategic change. As such, Change Management should form a crucial part of any and every Shared Services implementation or optimization.

If you believe that you could benefit from additional support in this area, or for any questions and comments, please get in touch with Chazey’s practitioners via [enquiries@chazeypartners.com](mailto:enquiries@chazeypartners.com) or visit Chazey’s website at [www.chazeypartners.com](http://www.chazeypartners.com)

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Our experience covers both Private and Public Sectors, providing expertise in a wide spectrum of business functions, including Finance, HR, IT and Procurement.

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