



KB2N STRATEGIES

A FIELD GUIDE FOR SHARED SERVICE TEAMS

Shared Service Teams

TEN OPERATING PRINCIPLES

Shared services succeed when focused on every local site being its best. These **ten principles** keep the focus on excellence, value, and the local sites you serve.

01

Excellence before scale.

Shared services must first be about enabling excellence. Then about capturing economies of scale. Never the other way around.

02

A clear line to the dollar.

Each shared service position should have a clear, direct connection to increasing dollars in the door at a local site. If you can't communicate the value, it might not be there.

03

Be the best. Keep getting better.

Shared service leaders should be the best at what they do and steadily get better. Subject matter expertise is the bare minimum; innovating and pushing the entire field higher is the goal.

04

Show up in person.

Being at a local site comes with specific physical demands — and so does shared services. Get in your car, get on a plane, and be in person with the teams you're serving.

05

A formula with no mystery.

Develop a formula for allocating shared service expenses. Be transparent about the formula and remove any mystery about what is included in the allocation.

06

A shared goal.

Either hold one shared goal across the entire organization, including shared services, or tie the shared services goal to the number of local sites that make goal.

07

Inspire connections.

Shared service employees get to see the strengths and weaknesses of every local site. Actively connect those sites with each other for collaboration and cross-learning.

08

Measure every year.

Measure the effectiveness of shared services annually — and how well local sites partner with them. Share the results both ways, be transparent about the survey, and build action plans where needed.

09

Build Systems with Flexibility.

Process and systems are important to successful shared service teams, but the goal is to raise the most, not to have the most rigid system. Listen to the local teams and be open to adjusting and to making exceptions.

10

Weave into local life.

Weave shared service employees into the life of the local site, including staff retreats and celebrations.

SUMMARY

“Focus on excellence, transparency, and culture.”

Looking to build a shared services team that enables, not smothers local success? Reach out for solutions tailored to you.



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