



KB2N STRATEGIES

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AN INTRODUCTION FOR SYSTEM LEADERS

Shared Service Teams

TEN GUIDING 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.

EXCELLENCE FIRST

01

Excellence before scale.

Shared services must first be about enabling excellence. Then about capturing economies of scale. The rewards aren't tied to how the same you make everything. Success comes when you focus on excellence for everyone. Often, spreading expertise and resources efficiently is part of the formula for excellence.

LINKED TO IMPACT

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. Being able to articulate unambiguous value builds trust in the system and the people guiding it.

MASTERY

03

Be great and get 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.

PRESENCE

04

Be there in person.

Being at a local site comes with specific physical demands, and so does shared services. Be present. Make your visits about supporting the local team and understanding their day-to-day. Be a thoughtful guest; avoid making your visit extra work for the local team.

TRANSPARENCY

05

Make expenses visible.

Develop a formula for allocating shared service expenses. Be transparent about the formula and remove any mystery about what is included in the allocation. Review the formula every few years with the local teams to ensure it's the right approach.

COLLABORATION

06

A shared annual goal.

Either hold one shared goal (operational or fundraising) across the entire organization, including shared services, or tie the shared services goal to the number of local sites that meet their fundraising goal.

CONNECTIONS

07

Make connections.

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

MEASUREMENT

08

Survey 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.

FLEXIBILITY

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.

BELONGING

10

Weave into local life.

Weave shared service employees into the life of the local site, including staff retreats and celebrations. Don't overthink this part and understand that some shared service employees will worry about imposing. Help everyone by explicitly inviting shared service colleagues to be on-site.

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.



KB2N STRATEGIES

Kenya Beckmann

PRINCIPAL ADVISOR

(949) 259-3899

kenya@kb2nstrategies.com

www.KB2NStrategies.com

2901 W. Coast Highway, Suite 200, Newport Beach, CA 92663