UC Davis Shared Services Center

• Objectives of Shared Services
  – Redirect cost savings to core mission
  – Process efficiency and standardization
  – Enable business units to concentrate on core activities and mission
  – Consistency of policy application and compliance
  – Customer service model with high quality of service
Shared Services Model

• Implemented on February 14, 2012
• 1 center with 64 career staff, 3 LTA, 11 temp, 9 student assistants
• Support HR, Finance, and Payroll related transactions
  – ~90 different processes supported
• Implementation Divisions
  – Included administrative units (6 large divisions)
  – Excluded academic units, medical center
    • Current cluster service models
    • Future plan to migrate to shared services
Challenges & Lessons Learned

• Leadership
  – Establishing strong senior leadership
  – Secure support from all levels of management

• Culture
  – Make appropriate “up-front” decisions to focus and manage the change
  – Focus more on organizational change management
  – Prepare for pushback
  – Educate key stakeholders ongoing
  – Keep shared services team morale high

• Implementation
  – Implement appropriate and strategically aligned technology that enables process efficiency
  – Analyze processes from end-to-end
  – Developing a customer-focused mind-set
  – Gaining in-depth buy-in on service level agreements and their definitions
  – Develop performance measures – comprehensive scorecard
  – Prepare for unexpected staff workload
  – Build in continuous improvement early on
Addressing Challenges Through Process Management

- Continuous Improvement
- Management Commitment
- Customer Focus
- Right Work, Right First Time
- Error Prevention
- Metrics
- Corrective Action
- Teamwork

**Process Management Principles**

Equals

Higher Quality  Higher Customer Satisfaction  Lower Costs  Lower Errors
Process Improvement Approach

Step 1
• Gain agreement on the problem definition and understand the root causes

Step 2
• Identify the stakeholders and the appropriate user(s) and define the solution boundary

Step 3
• Identify the constraints to be imposed on the solution and categorize actions into short- and long-term change implementations

Step 4
• Negotiate a consensus on what will change, when and how

Step 5
• Plan and execute implementations; re-evaluate voice of the customer

*Steps 1-3 can be combined into one workshop for scheduling and resource allocation needs.*
QUESTIONS
Shared Service Centers: After Go-Live Considerations and Lessons Learned

Jill Goldsmith, Program Manager, Program Management Office, UCSF
Service Centers in Pre-Award and HR

- Service Center Attributes
  - HR: 180 staff; 5 centers plus specialty groups; centers grouped by business line; two locations
  - Pre-Award: 125 staff; 10 teams plus specialty groups; teams grouped by business line; multiple locations

- Common to Both
  - Competitive Recruitment with approaches to drive retention
  - Career Tracks
  - Training
  - Service Level Agreements
## Timeline

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Keys to Success in Implementation

- Strong, visible, supportive senior leadership
- "High touch" and structured change management
- Adaptability in implementation
  - Perfection prior to implementation won’t happen; Implement and refine
- Accountability
- It takes a village:
  - Broad campus representation in the assessment and design phases
  - Faculty participation throughout the process
  - Collaboration with client departments in the implementation phase required
Lessons Learned

- It is less about process than it is about procedure
- Pilot and allow time to adjust
- Be realistic about staffing ratios
- Working in a service center is different than working in a department
- On going feedback is critical
- Prepare for challenge areas
  - Space and infrastructure considerations
  - Recruitment
  - Funding model
  - Team resources
Questions