

Shared Services Readiness Diagnostic

Evaluating Shared Services Opportunities

	Yes	No
1. Is a significant percentage of our transactional, business support activities performed by department- or unit-based business support staff, without oversight or budgetary control by central administrators?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do our central administrators struggle to quantify labor expenditures and transactional activities performed by decentralized support staff, making it hard to identify efficiency or cost savings opportunities?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are our larger departments and units over-resourced in support staff, while smaller units suffer from inconsistent coverage or go without key services?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are our faculty completing an increasing amount of administrative tasks (e.g., compliance requirements), limiting their ability to focus on teaching or research?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do we expect a significant portion of support staff to retire in coming years (for some institutions, up to 30 to 50%)?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do our younger faculty and staff seem more receptive to self-service mechanisms for administrative support?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do we have growing online education and/or sponsored research ambitions that necessitate either increasing support staff counts or scaling existing structures to better meet expanding needs?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are there administrative functions on campus where automation capabilities have not been fully utilized?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do our business processes vary widely across campus, making transition to automated backbones difficult?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do we have plans to migrate to a new ERP platform, necessitating greater process standardization and central coordination?	<input type="checkbox"/>	<input type="checkbox"/>

Preparing Academic Partners

	Yes	No
1. Do we have external and/or internal benchmarks to articulate to faculty the cost and quality decrements of the current support model?	<input type="checkbox"/>	<input type="checkbox"/>
2. Can we incubate shared services in a pilot site to generate longitudinal data to make the case for broader campus migration?	<input type="checkbox"/>	<input type="checkbox"/>
3. Can the new shared services center provide our faculty with improved service quality and additional services at no extra cost?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are we able to incent department heads to participate by promising a tangible portion of shared services savings to reinvest in value-add activities?	<input type="checkbox"/>	<input type="checkbox"/>
5. Can we provide deans and unit staff with advance warnings to shared services migration plans, allowing support staff to seek other positions or receive the training needed for more task-specialized roles?	<input type="checkbox"/>	<input type="checkbox"/>

Designing the Shared Services Model

1. Can we reinvest any savings from strategic sourcing, process simplification, or IT consolidation in shared services?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do we envision the end-state support model as:		
a. multiple business service centers distributed across campus, or	<input type="checkbox"/>	<input type="checkbox"/>
b. a single shared services center supporting the entire institution?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do we know any academic or administrative leaders who might be willing to partner in a shared services "proof of concept" pilot?	<input type="checkbox"/>	<input type="checkbox"/>

Shared Services Readiness Diagnostic (cont.)

Designing the Shared Services Model (cont.)

	Yes	No
4. Is there a high-performing administrative or academic unit with the capacity to expand its support services to other customer units?	<input type="checkbox"/>	<input type="checkbox"/>
5. In order to conduct the data analysis needed to determine staffing levels and triage processes, do we:		
a. have the funding to hire external consultants, or	<input type="checkbox"/>	<input type="checkbox"/>
b. prefer internal surveys and other data-gathering methods to baseline transaction volume and costs?	<input type="checkbox"/>	<input type="checkbox"/>
6. Should pilots should begin with:		
a. "least controversial" processes, establishing trust to address more ambitious projects later, or	<input type="checkbox"/>	<input type="checkbox"/>
b. "most broken" processes, thereby achieving ROI on a few impactful functions quickly, or	<input type="checkbox"/>	<input type="checkbox"/>
c. a wide range of business support services at once, thereby developing and testing a comprehensive structure ready for quick roll-out to other units?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are we using process improvement tools to encourage staff to identify duplicative manual steps and areas ripest for simplification or automation?	<input type="checkbox"/>	<input type="checkbox"/>
8. Can we afford to absorb near-term increases in staff headcount as new services are rolled out, awaiting eventual attrition of unit-based generalists?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do we have historical trends and predicted retirement data in order to better predict staffing needs?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have we communicated to staff that positions in the new shared services center come with the prospect of improved training, better compensation, and more attractive career paths?	<input type="checkbox"/>	<input type="checkbox"/>
11. Have we developed competency assessments to match individuals to positions and encourage resistant staff to self-select out of shared services?	<input type="checkbox"/>	<input type="checkbox"/>

Embedding Continuous Improvement into the Model

	Yes	No
1. Does our shared services center use two-way service level agreements (SLAs) that emphasize both customer and service center responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does our shared services center have a governance board with representatives from both central administration and academic units?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are penalties charged to departments that ignore standardized processes and create rework?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does our shared services center incorporate ticketing software that measures incidence, mix, and resolution to customer support requests, identifying areas for continued improvement?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does our shared services center deploy dedicated staff teams to examine process vulnerabilities on a rolling basis?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do we set operational or transactional targets for each shared services task, measured on a weekly or monthly basis?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do we utilize pay-for-performance evaluations of shared services staff based on key performance indicators?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have we established an online self-service portal or bot to triage initial customer requests across a range of support functions?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have our shared services leaders invested in a culture of continuous improvement and customer service training?	<input type="checkbox"/>	<input type="checkbox"/>