

Shared Services Consolidation Diagnostic

Use EAB's Consolidation Diagnostic for a Shared Services Gut Check

To help you determine which activities are prime candidate for shared services, EAB created the Shared Services Consolidation Diagnostic. It provides a framework for identifying the greatest lead-off opportunities for shared services. The diagnostic assesses a process based on efficiency and service, the two main factors to consider when consolidating activities. It helps leaders answer the questions, "will providing this service at scale make the process more efficient," and "will it improve—or at least maintain—service quality?" The activities that provide the best opportunities for scale will have at least a few "yes" answers in each category.

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Six or more "yes" responses across the efficiency and service questions below indicate that an activity is likely a good candidate for consolidation

	Question	Check Yes
Efficiency	Is the task transactional in nature?	☐
	Is the task complex and performed infrequently enough in the unit that scale would improve competency?	☐
	Is there financial benefit to service delivery at scale?	☐
	Does the task have high transaction volume across multiple units?	☐
	Can the task be easily standardized or automated?	☐
	Is the service need similar across a significant portion of campus?	☐
Service	Do staff currently struggle to meet baseline service expectations for this task?	☐
	Is campus dissatisfied with the current mode of service delivery?	☐
	Can the task be completed without frequent face-to-face communication or knowledge of individual customers?	☐
	Is providing this task core to the institutional mission?	☐
	Would consolidated staff be able to tailor the process to any principled customization needs?	☐

Source: EAB interviews and analysis.