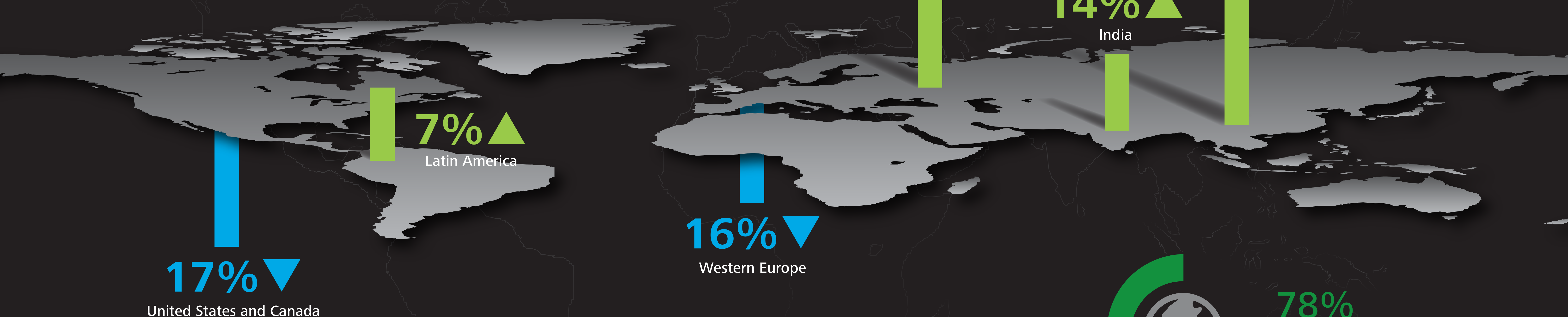
A new world of business

2015 Global Shared Services Survey

Since 1999, Deloitte has conducted a biennial survey on shared services organizations to explore the evolving concept and assess emerging trends

Geography trends

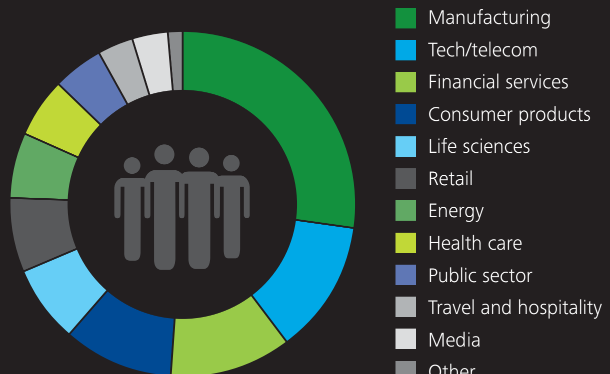
Compared to the 2013 survey, respondents indicated that the geographic footprint of shared service centers (SSCs) is shifting from developed to emerging markets



78%
of SSCs provide services for one or more continents

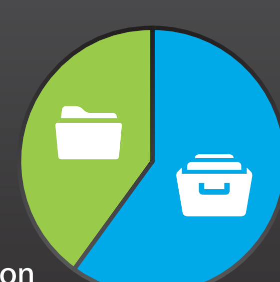
Respondent demographics

Industries represented



Scope

Respondents reported that the majority of SSCs are multi-function. The top functions in an SSC environment are consistent across functions.



40%
single function

60%
multi-function

Top 3 functions

- Finance
- Human Resources
- Information Technology

71%
percent of respondents are looking to increase the number of functions within their SSCs in the future

Deloitte.

Organization

While the definition of global business services (GBS) varies across organizations, the majority of respondents share the value of shifting to a GBS model

28% of respondents indicated multi-sourced as a GBS characteristic

74% of respondents reported that their organizations have a GBS leader whose responsibilities span across a multitude of areas such as continuous improvement and global process ownership

24% of respondents indicated that their organizations did not develop a business case before transitioning to a GBS model because they believed it was an obvious next step

74% of respondents reported that their organizations have a GBS leader with significant responsibility across multiple functions

Journey and value

Respondents indicated a strong preference to 'lift and shift' processes on the journey to a SS environment

61% of respondents standardized processes after moving to an SSC

13% of respondents followed a "big bang" approach by standardizing processes and simultaneously changing technologies during the move to SSCs

Respondents reported their organizations are getting quicker paybacks from their SSC investments, while others have not incorporated tax considerations as part of the strategy

2013 **2.6** year average payback period

2015 **2.3** year average payback period

30% of respondents did not incorporate tax into their strategic decision

Future of shared services

There will be an increase in growth of SSCs/GBS organizations and those organizations will prioritize and shift their focus towards growing their analytics capabilities

16% of respondents indicated wanting to open a new SSC

100% of respondents indicated that shared methods and tools were the primary benefits of a GBS model

26% of respondents reported that they will have a dedicated team to monitor the SSCs continuous improvement

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www.deloitte.com/us/2015GSSsurvey