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Stan is a principal with Deloitte Consulting LLP, specializing in strategy implementation to improve clients' customer operations.

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Applying the concept of “customer experience” to shared services

Businesses today are embracing “customer experience” as one of the most important ways to drive sales, customer loyalty, and competitive differentiation. And while shared services users might not be customers in the traditional sense, providing them with a superior experience can yield significant benefits for the business, including: lower costs; improved self-service; and higher employee satisfaction, engagement, and retention.

How does the customer experience concept apply to shared services?

Leading companies are constantly raising the bar through a continued focus on experience. They recognize that dozens of individual interactions shape the overall impression of their brand. They also recognize that their customers' expectations are constantly changing, and that a great experience requires care and feeding.

As consumers, we know what a great customer experience feels like, and, of course, what a terrible experience feels like. As employees, we don't leave those expectations at the door when we show up for work.

With the evolution of digital, information is now even closer than “at our fingertips” since accessing information often doesn't require fingertips at all. We can get an answer to almost any question simply by *asking* our phones.

Access to products and services is also ubiquitous and instantaneous. Movies can be streamed the moment we are ready to watch them, wherever we happen to be. Products can be purchased at the tap of a finger—informed by personalized recommendations and detailed reviews from other customers—and then magically show up at our door in a day or two (or even an hour or two), with automatic alerts every step of the way.

That's the kind of experience people expect outside of the office, and it's what shared services are subconsciously being measured against.

The good news is that providing employees with a superior experience can also provide significant benefits for the business. For example, improving the tools available for HR and IT self-service can potentially reduce frustration and helps employees feel as if the company really cares, it also helps them get back to work more quickly—boosting productivity. Also, it can reduce need to contact the help desk, which requires direct involvement from human experts and is therefore much more costly.

How can predictive analytics be used to create a better experience for shared services customers?

Predictive analytics can help a shared services organization understand and anticipate users' needs so it can serve them better and provide a highly personalized experience. In fact, by applying predictive analytics to the massive amounts of data being generated in an increasingly digital world, it is often possible to understand users' needs even better than they do.

Shared services can also use predictive analytics to spot emerging trends and prepare for unusual spikes in service demand. For example, a localized increase in health-related queries to the HR system might provide early warning about an emerging flu epidemic within the workplace, enabling a shared services center to pro-actively shift resources and staff to service areas that are likely to be inundated with requests. Perhaps even more important, the same early warning could enable decision-makers in the business to call for a work-from-home day (to curtail the spread of disease), roll out flu shots earlier, or develop workforce contingency plans that minimize the impact and risk of operational disruptions.

What are the key pitfalls to avoid when pursuing an improved customer experience for shared services?

The most common pitfall is trying to implement advanced customer experience capabilities before you've mastered the basics. In shared services, there are some fundamental capabilities that have a huge impact on effectiveness and provide the foundation for future results.

A good first step is to make sure self-service resources and tools on the website are as comprehensive and convenient as possible. Many people actually prefer self-service to full service for routine tasks, so having robust capabilities in this area is both less expensive and more effective. That's Tier Zero.

Next is Tier One, which is the point where users move beyond self-service options and reach out for help from human experts. Strong Tier Zero capabilities can greatly reduce the volume of work at Tier One; however, when escalations do occur, it is important for this level to be adequately staffed and supported by the right operating models, organizational structures, processes, policies, and performance metrics to help ensure results are achieved. It is also very important for Tier One to take ownership of problems, instead of leaving users to fend for themselves if solutions prove elusive or things otherwise go awry. A superior shared services experience never leaves users feeling lost, abandoned, or frustrated, especially when the going gets tough.

What does the future hold for customer experience in shared services?

Expectations for an improved shared services experience will continue to rise and evolve at a faster and faster pace, partly driven by advances within shared services—but perhaps even more by advances in the day-to-day experiences that the world's best companies provide to their customers. To keep pace, shared services organizations will need to establish nimble operating models that can quickly adapt to new business requirements and rising expectations. Static models that are locked into doing things a particular way might be effective and efficient for a while, but in the blink of an eye could become uncompetitive and obsolete.

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