Whitepaper

A Guide for Process Automation in Shared Service Centers

JADE GLOBAL™

www.jadeglobal.com info@jadeglobal.com +1-408-899-7200

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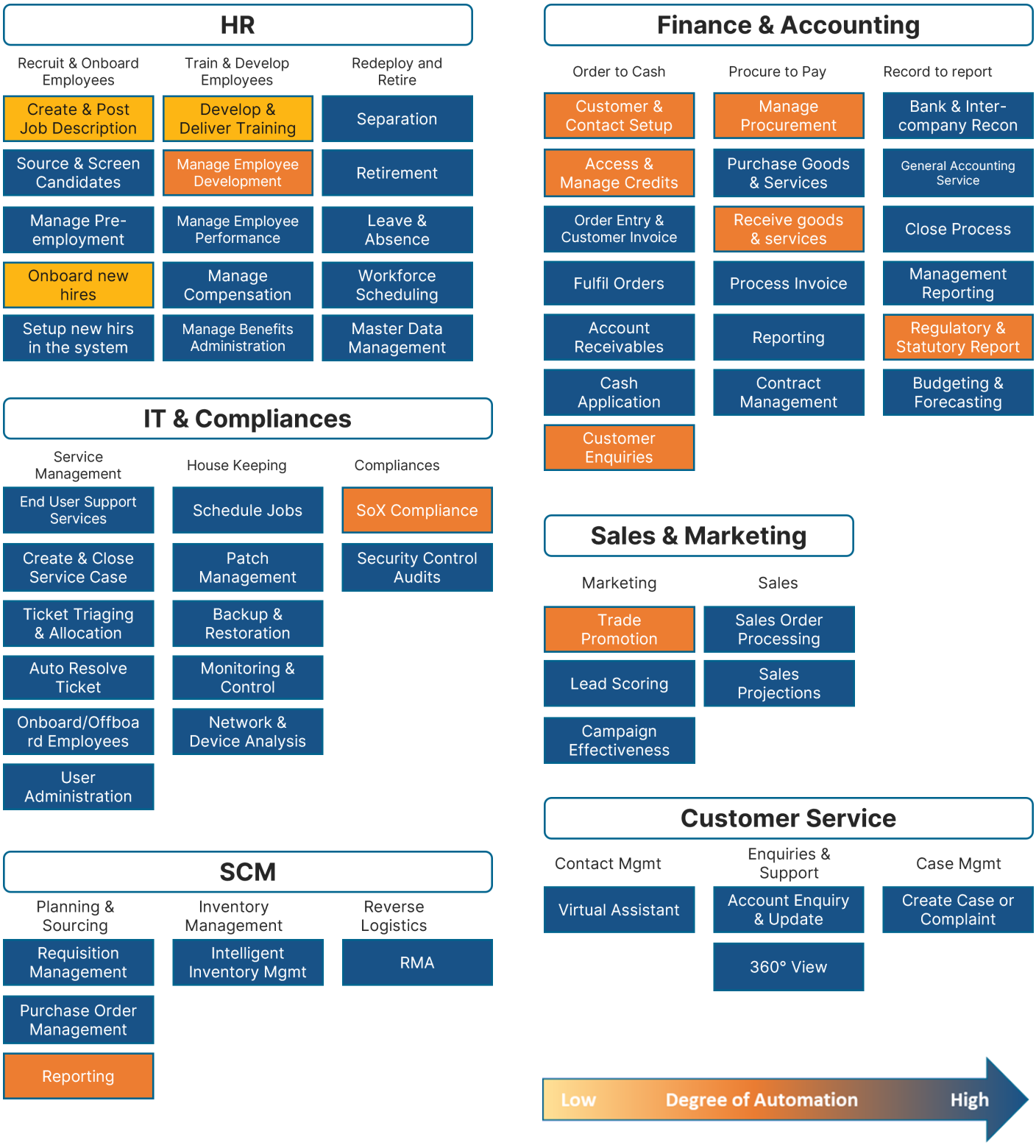
With the industrial revolution in the last century, business processes also evolved across different departments to address needs arising due to the high volume of transactions, complexity, and changing consumer demand. In the early 80s, industries realized that many administrative processes, for example, Payroll, could be consolidated and centralized as shared services to control the cost of operations. Since then, back-office operations across multiple lines of business (LoBs) have moved under a shared service center (SSC).

It has evolved as a strategic initiative for large corporates for process and efficiency improvement, technology enablement, and cost reduction. A generic view of the Shared Service Center with back-office processes/operations is covered below.
This image is just an illustration and not limited to the LoBs/Processes mentioned. Organizations may have many more processes covered under SSC.



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How to Identify Processes Qualified for Shared Service Center

The Thumb rule suggests that a process must be qualified against characteristics mentioned in the table below for the qualification to include in SSC.

Characteristic	Description
Self-Governed Body	Processes/operations within the ambit of SSC should not cross paths with other LoB processes. LoBs could be touchpoints for inputs/approvals/authoring etc.
High-volume transaction provider	Processes are refined for higher economies of scale to offer low-cost operation.
Specializes on services owned	Human resources in SSC are highly skilled in performing tasks pertaining to services SSC owns to offer services at higher efficiencies – Tasks/processes are governed through SOPs, so it's easy to train the human resources.
Global in nature	Effective SSC takes care of processes across business units in different geographies, which also indicates that SSC has templatized standard/best practice processes that can be replicated to different businesses with minimal exception/extension paths.
KPI benchmarking and continuous improvement	SSC requires guidelines to monitor key business KPIs and continuous refinement to best practice processes for higher efficiencies. That means up-skilling, cross-skilling, and change management are an integral part of SSC.

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Key Challenges in Shared Services Model

Even though SSC is a successful model across industries for saving cost and improving process efficiencies. However, increasing market demand and complex products and service offerings are posing many-fold challenges to shared services.

1. Adoption of new processes to be taken care of by the SSC.
2. Shortage of skilled resources for new hire.
3. Re-skilling/Cross-skilling human resources and required lead-time.
4. Continuous cost reduction while zero-tolerance for deterioration in services to customers.
5. Maintain a high degree of compliance.

Though processes in SSC are driven by best practices and governed through Standard Operating Procedures (SOPs), the human factor adds to the challenge.

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Shared Services Center Resonates Well with Automation Prerequisites Paradigm

Lately, automation or intelligent automation has picked up pace across the globe. More and more enterprises have started adopting Intelligent automation as one of the strategic initiatives to automate their mundane processes to reduce human dependencies on them and free up existing human resources capacity for them to focus on high value-added tasks.

Intelligent automation is an amalgamation of technologies like Robotic Process Automation (RPA) and AI/ML. While RPA is designed to automate the process by mimicking rudimentary human action to perform a task, AI/ML augments cognitive capabilities to these automation solutions to deal with semi-structured or unstructured data inputs or for prescriptive/predictive analytics or, in certain situations, decision-making as well.

For simplicity, let's take the example of an autonomous car. RPA technology can mimic human actions like accelerating, braking, moving forward, moving backward, moving right, moving left, or combining all these movements.

Just as humans act based on situations on the road, like traffic, sudden braking by the car ahead, bumpy road, etc., even an autonomous car can be trained to do the same. This is possible with the aid of RPA technology, AI/ML, cameras, and sensors, collecting continuous feed of data. The Car AI can interpret that data and send signals to RPA to mimic human actions in those situations.

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Process Automation at Shared Services- What to Automate?

Key qualifiers for a process to be automated resonate well with a process' key characteristics to qualify for a shared service (as mentioned in table-1). In other words, all functions in SSC are low-hanging fruit for automation to address SSC challenges.

Process Automation Qualifiers	SSC Process Characteristics
The process must be self-contained	Self-governed Body
The process must have a high number of occurrences	High-volume transaction provider
The process must be rule-based and highly repetitive	Specializes on services owned
The process must be standardized across BUs	Global in nature
Measurable outcomes	KPIs benchmarking and continuous improvement

In other words, Automation Center of Excellence A-CoE can be an extension of SSC in your organization. Hence, it becomes more logical to first qualify a process to become part of SSC, re-engineer it and then handover to A-CoE for the process automation.

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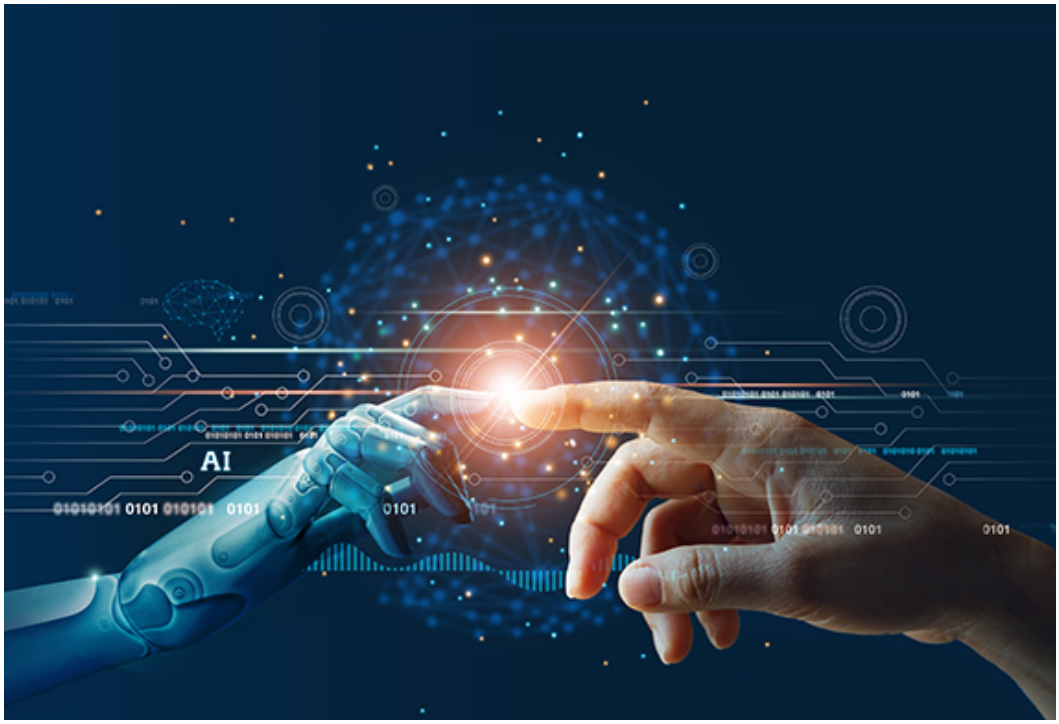
Shared Services Automation



Shared Services plays a crucial role in the internal operations of large organizations. By centralizing and executing high-volume business processes and back-end operations, SSC helps consolidate efforts and deliver enterprise-wide benefits.

Shared Services Automation takes this concept further by automating the consolidated processes, resulting in increased productivity, cost savings, and improved employee and customer satisfaction, among other benefits. Technology like RPA can automate shared services center and enable better efficiencies across the business.

“More than 80% of shared services organizations have implemented robotic process automation technology” Gartner

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Jade's View of Shared Services Automation

No matter whether it's LoB or Shared Service Center taking care of the process in your organization, Jade recommends enterprises embark on process automation as soon as possible.

In an enterprise, process automation must be started with process assessment and the establishment of an Automation Centre of Excellence (CoE). This helps enterprises carefully create a process backlog with the right processes eligible for automation with exposure to low business risk and high ROI.

Jade's Approach to Adoption of Enterprise Automation

01 Discovery/PoC

- Applicable Use Case Planning/ ROI
- Establish Process Intelligence Platform
- Process Discovery & Prioritization
- Technology Evaluation
- POC's
- Security and Audit best practices

02 Pilot Project

- Expand PoC implementation
- Go Live (Production)
- Rollout change management
- Evaluate impact
- Collect key data
- Develop business case and high-level roadmap

03 Automation CoE

- Establish centralized automation operating model
  - Governance Body
  - Architecture conformance
  - Process Demand Management & Prioritization
  - Establish Quality Gates
  - Establish KPIs, Measure & Improvement plan

04 Implementation & Support

- Continue to work with stakeholders to identify incremental automation opportunities
- Scale down programs to business units (BUs)
- Continue to track and realize benefits
- Offer RPA as-a-service or Bot Farm

Our Approach Helps Overcoming Adoption Challenges*

- Lack of clear strategy & roadmap for AI and RPA
- Lack of skilled talent for AI and RPA
- Functional silo constrains end to end RPA/AI solution
- Lack of leaders' ownership & commitment for automation
- Lack of technology infrastructure to support RPA/AI
- Lack of available data or data collection
- Uncertain or perceived low expectation for ROI from RPA/AI
- Cultural challenge of accepting and/or adopting RPA/AI

** Our approach is refined based on McKinsey Survey "AI adoption advances, but foundational barriers remain" depicting cross-industry challenges in RPA/AI adoption*

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Key Considerations for Shared Services Automation

When implementing shared services automation, the key considerations that Jade focuses on are:

Integration with Existing Systems
Shared services automation should integrate seamlessly with existing systems and processes to avoid disrupting operations.

Scalability
Shared services automation should be scalable to handle increasing volumes of work as the organization grows.

Security
RPA automation at shared services centers should be secure enough to protect sensitive data, such as employee and financial information.

Change Management
As shared services automation brings a significant change in processes and workflows, developing a change management plan is essential to ensure the right transition.

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Benefits of Process Automation in Shared Services

Universal simplicity
Through process automation, jade helps integrate your SSC with ERP systems, promoting visibility across all formats and receptions channels.

Improved Compliance
Shared services automation is a great option for businesses concerned with compliance. By eliminating manual processes, it ensures that your SSC remains compliant for activities like e-invoicing.

Enhanced visibility
Whether it's pulling open AR from multiple ERP instances or providing real-time budget control and follow-up, Jade's AI-driven RPA can provide enhanced visibility enlarging the scope of SSC.

Time & cost savings
RPA at SSC drives time and cost savings by fostering a more productive environment through:

- Intelligent data capture
- Tracking & archiving
- Rule-based workflow
- Invoice data auto-match

Support for SSC expansion
40% of SSC are planning to scale down their footprint but broadening their operations. Automation supports SCC expansions, enabling businesses to pursue a GBS (global business service) model.

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Jade’s Expertise in Automation

Jade Global brings you a full-cycle AI RPA Services that infuses Intelligent Automation for your enterprise, allowing you to experience the advantage of an intelligent workforce, without the hassle of having to hire and manage them. Our enterprise-grade digital solutions are built with "agile by design," resulting in faster automation, greater scalability, cost effectiveness and enterprise-wide deployment, that allows you to free up your staff from manual tasks and focus on more strategic contribution.

We are partnered with UiPath, SAP, Salesforce CRM, Dell Boomi, MuleSoft and Snowflake, AWS, Microsoft and ServiceNow, to provide you the best of services in the technology space. Within RPA & AI, our teams have worked on UiPath product suite, Automation Anywhere product suite, ABBYY integration, Google Vision integration & Kanverse integrations.

- Exclusively focused on and specialize across LoBs/SS Cand in key Enterprise Applications like SAP and Oracle
- Strong industry experience and customer references
- Focus on end-to-end process improvement than just implementing a RPA solution
- Strong product knowledge and experienced team
- 100% Invested in customer success

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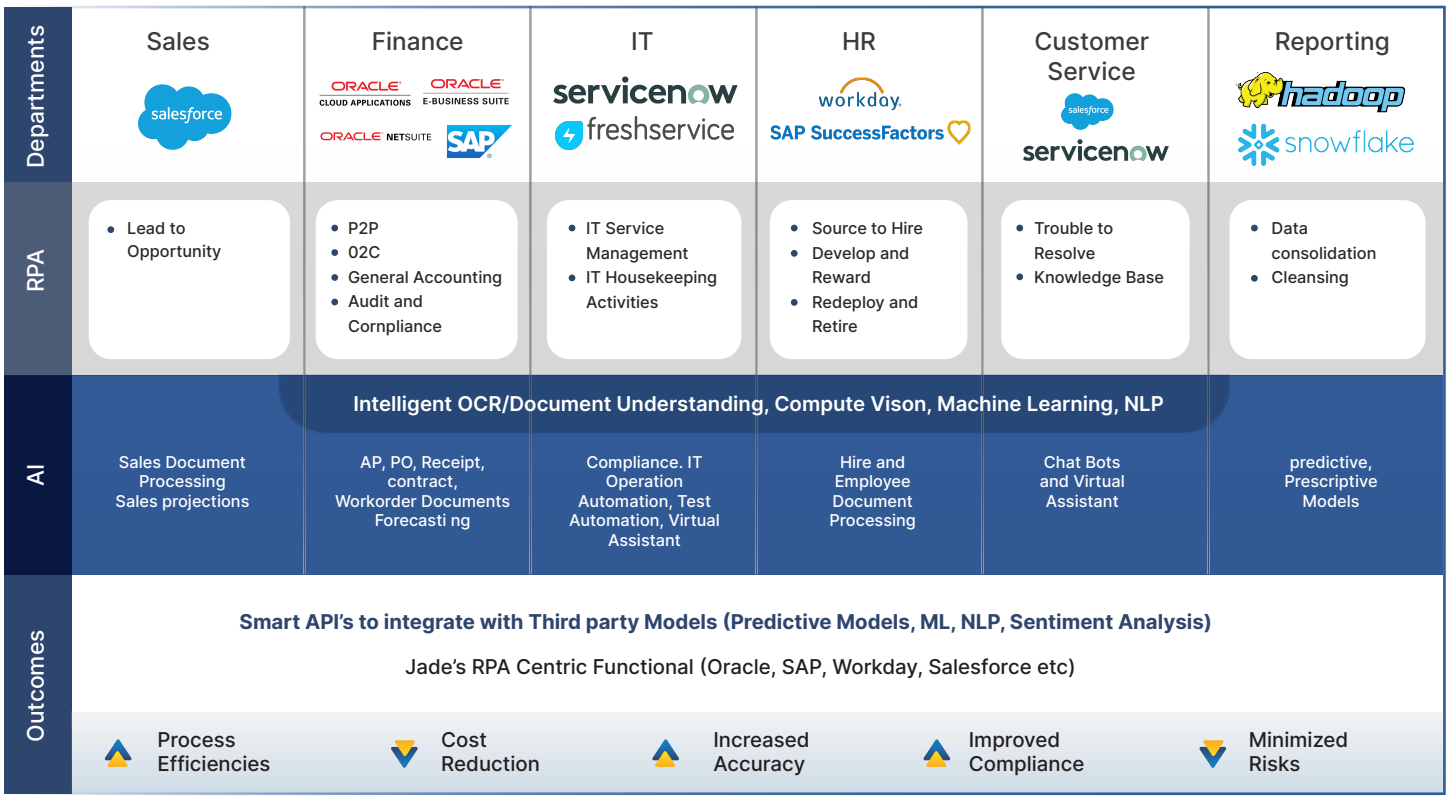
A high-level view of Jade's enterprise-level process automation approach

Intelligent Automation For The Enterprise



Jade's Accelerators and Technology for Process Automation

Jade's Intelligent Automation Framework

Over the years, through its automation implementation experience, Jade Global has built a technology-agnostic framework, "Intelligent Automation Framework." The Framework is powered by reusable components that can be used across various process automation. These components accelerate the implementation cycle up to 30% faster, resulting in higher ROI.

Key capabilities of our Framework

- Human bot interaction
- Error handling and retrial
- Centralized logging
- Template engine etc.

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Partner with Jade
Let us guide your path amidst the clouds and help you build the future enterprise.

Be an expert
Become a master in the interplay of domains and industries. Drive higher benchmarks of success.

A leader
Knowledge powerhouse we all hold together-clients, partners and Jade experts.

Contact us to know more about our other Industry Solution

For more information

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www.jadeglobal.com info@jadeglobal.com +1-408-899-7200

1731 Technology Drive, Suite 350 San Jose, CA 95110

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