The Missing Link: Organizational Alignment Across the Enterprise Is Key to Delivering Value to Customers

The way we do business is in a state of rapid transformation – the traditional business model is changing and competition has never been fiercer. In this current environment, the stakes are high for organizations to enable innovation while cutting costs.

Challenges

Our client was struggling after creating a shared services team who served two vastly different lines of business with different needs and priorities. This made it difficult for the shared services team to realize benefits from consolidating resources like greater economies of scale and less duplication of effort.

When we did our initial assessment, we found a few root causes of the struggle – the organizational structure was complex, processes were undefined and unmeasured and there were communication gaps. Because expectations were not consistently met, the shared services team did not have a good working relationship with clients, and the team was viewed as not having a thorough enough understanding of the business to offer meaningful solutions. So even when projects were completed on time and on budget – client satisfaction remained low.

Solution & Approach

We approached our assessment knowing we were working with smart, capable people who wanted to be successful serving their internal clients. Our main objective was to help our client prioritize initiatives that would shape their shared services team into a customer-centric organization.

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When one complex enterprise organization came to us to improve the customer experience for the internal business partners of a shared services team, we knew the pressure they faced and that they had to increase customer satisfaction. They faced a unique challenge: becoming more customer-centric while meeting a range of client demands – from day-to-day support to larger, more complex projects across two very different divisions of the company.

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We started by asking the shared services team's internal clients about their expectations and experience working with the team. We met one-on-one with 22 employees from both lines of business – ranging from those at the executive level down to individual contributors. We created an interview guide and user survey to help the team measure customer experience and surveyed 45 additional clients directly to get their feedback.

From here, we used the Forrester® model of customer experience to identify areas for improvement and created a list of recommendations based on insights from the assessment. We translated these recommendations into campaigns with action items and placed them on a roadmap for streamlined execution.

Some recommendations, like a communications campaign, would work to benefit all customer experience relationships; while others, like project templates, were focused on improving the experience with large projects or ongoing support.

The responses provided data that helped us understand how both clients and stakeholders were interacting with the shared services team. It also helped us develop a roadmap of recommendations to improve the customer experience, including:

- **Align on expectations**
- **Improve communications**
- **Tailor training**
- **Shore up templates and processes**

Results & Lessons Learned

First and foremost – our client wanted a real assessment – not just a description of how we could help or areas where they could improve with no follow through. With so many different competing interests across different business lines, we knew it was essential to build solutions that worked across the enterprise and drove alignment. So we built recommendations that not only addressed improvements in the shared services team's process, but also supported change management initiatives. The end result was so effective that similar assessments are being replicated in different groups within the organization.

Serving your client well – whether an internal or external client – takes hard work, understanding and continuous improvement. Asking for feedback can be hard, but it is key to everyone's success.

At Collective Insights, we're focused on solving our customer's unique problems rather than applying a cookie cutter solution and then walking away. Through collaboration, we help bridge the gap between business and technology to improve relationships – and ultimately – efficiencies.

"We started this assessment by focusing on understanding our clients' customers and their expectations and by the end – they had internal customers who finally felt heard and a clear path forward to collective success."

Seth Ryan, Partner

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