Abstract
This white paper explains the importance of redesigning job roles in an internal customer team when transitioning to a shared services model. Companies that do this effectively achieve the full range of benefit from using a shared services model—including increased performance, process efficiencies, cost savings and employee satisfaction.

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Executive Summary

This white paper provides insights about the transition to a shared services model and the importance of redesigning job roles within the internal customer team. Without role redesign, neither the internal customer nor the organization as a whole can receive the full benefits of a shared services relationship.

Successful shared services relationships result in improved efficiencies through the organization, end-to-end cost savings and satisfied and productive employees.

The Global Business Services unit at EMC has years of experience helping internal customers make this transition. This paper presents a framework for successfully redesigning roles, which include the risks of not properly realigning job roles and the most important factors to enable the organization to thrive using this collaborative operational model.

Introduction

Case Study

After it was acquired in 2006 RSA, the security division of EMC, moved many of its financial processes to EMC Global Business Services (GBS) but retained the Credit and Collections function. Because they anticipated moving services to GBS, but never made any official plans to do so, management decided not to replace departing team members as full time employees. Instead, they hired short-term, high-cost contractors to fill empty positions. The contractors were underperforming and, as a result, the manager was overloaded while working significant hours every week. In addition, the team was not aligned to optimize processes and workloads. The team was drowning in work and RSA was paying very high costs for an inefficient process.

At its heart, the purpose of role redesign is to streamline business processes and gain efficiencies. This is achieved by transitioning non-core job tasks to the shared services team, thus giving employees a better match of skill set and core focus. Any type of job role redesign requires a deep understanding of the processes involved and the skills required for each job task.

Productive employees are the driving force behind all business operations and are especially important for large, global organizations. When management decides to reallocate work from one department to a shared services department, this directly affects employees in the internal customer team—the department or group sending work to shared services. If the transformation is mishandled, productivity can suffer and the department may not get the full benefit of this collaborative operational model. Without redesigning the roles of the internal customer team and the new
shared services team, organizations end up doubling the workload and missing out on the many advantages of consolidating operations. How can executive management ensure that employees remain productive and the shared services model works as designed? Effectively redesigning job roles of employees on the internal customer team minimizes potential risks and results in a highly functioning shared services relationship.

This white paper presents a framework to enable global businesses to get the most from the shared services transformation by maximizing the potential of both the existing internal customer and new shared services team. The framework enables organizations to avoid common pitfalls and take the time to identify, recruit or train for competencies needed to succeed in the new paradigm.

**Market Drivers Affecting the Need for Redesigned Roles**

Redesigning job roles is a critical challenge when moving to a shared services model. Business transformation, employee engagement and cost savings are a few of the drivers encouraging managers to realign and redesign roles for an effective shared services relationship.

Business transformations such as acquisitions, changes in the business environment or even budget cuts result in an opportunity to transform operations, enabling employees to be more effective, and enable departments and divisions to focus on core business goals.

The need to keep employees engaged is another driver for redesigning job roles to work in a shared services model. Lack of alignment between job roles and employee skills can cause dissatisfaction and discontent, which is a leading cause of difficulty during large-scale business process transformations.

Another major concern for large organizations is the need to manage costs across all areas of the business. Shared services are naturally cost efficient because of the centralization of work tasks. Yet, common pitfalls include duplicated work, excessive checking of work and poor process handoffs leading to diminished productivity. This occurs if the internal customer team does not properly redesign job roles to address core competencies, skill levels and business goals.

**The Effects of Poor Workforce Allocation**

Problems emerge when the department or team sending work to the shared services group does not adequately reallocate the work or properly redefine the roles of the individuals currently engaged in impacted job tasks.

Some of the most common indicators that an internal customer group would benefit from redesigning job roles include a shared services relationship that is not optimized, employees who are not focused on core competencies or process inefficiencies and unrealized cost savings.
Process Inefficiencies
When the employees in the customer team do not have clearly defined roles and responsibilities aligned with the shared services department, there is typically a drop in service level and dissatisfaction with the performance of the shared services team.

To remain productive and feel comfortable, employees require a certain level of clarity in their job roles and career path. When this clarity is missing or job tasks have been delegated to a shared services department without a proper redesign and communication of the employee’s new role, this can result in resistance and tension.

If the process is not handled smoothly, this can cause an *us v. them* mentality, with employees and management of the shared services organization seen as the enemy. This mindset can lead to dissatisfaction, mistrust, duplicated work, decreased productivity and the belief that the shared services model has failed.

Lack of Focus on Core Competencies
Effective role redesign requires unambiguous definitions for new roles and clear communication about the value of transitioning job tasks to shared services. This includes a review of job descriptions, communication of career paths and formalized expectations set around new skills, behaviors and competencies. Otherwise, employees may continue to perform the lower value job tasks that have been shifted to the shared services team. This failure to focus on their core skill set prevents employees from benefiting from the accompanying opportunities for growth, new job challenges and higher engagement.

Unrealized Cost Savings
Internal customer teams that do not redesign job roles often make the job more difficult. Much of the cost savings from working with shared services comes from enabling high cost employees to focus on high value work, while sending lower value work to lower cost employees through staff augmentation. When the transition and job role redesign is not handled carefully, work may be duplicated or recreated by the internal customer, as are the costs since there are two or more employees conducting the same work.
How to Redesign Roles

To overcome the challenges of poor workforce allocation, successful businesses redesign job roles on the internal customer team that is sending work to the shared services group. When looking to redesign roles to take full advantage of a shared services relationship, consider the following factors.

Executive Support

An engaged and committed executive team is critical to a successful move to a shared services model. As leaders of the change, part of the job of the executive team is to provide a vision for the future and help employees understand the need for the transition and the process to accomplish it.

Employees have many concerns during a transformation like this—such as job security, changes in culture and how to focus on continuing productivity. When the executives and management communicate the vision of the new organization effectively and transparently, employees trust their leaders and process, and are less concerned about changes negatively affecting their job roles. In addition, they will understand the measurements of success in the new environment.

Process Reengineering

Mature shared services organizations review the business plan of the internal customer team and create checklists to define and measure both quality and service to effectively redesign processes and job roles for the new model.

The process review includes learning about the different touch points for each process—who hands it off and to whom it is handed, characteristics of the process in its current and future states and also identifying the gaps. Processes and tasks that benefit from shared services are those that are repeatable, have a standard operating procedure or can be turned into a set of standards and rules.

Define Scope of New Roles

The main task in defining the scope of new roles within the established department is to discover the state of business operations today and determine what will be different in the future. This is accomplished by assessing each business process, working with management and internal subject matter experts to identify:

- Customers
- Outputs
- Inputs
- Systems required
- Necessary skill sets
- Resources required
- Who is doing the job today
Who should be doing the job in the future

**Analyze Gaps**

Redefining roles requires a gap analysis—an assessment of each employee and team based on their current roles in the organization compared to the skills needed for the new organization.

**Employees**
- Determine skills needed to conduct the job tasks
- Inventory existing skill set and current job role
- Identify skill set alignment with the new role
- Analyze skills gaps and develop training opportunities/redeployment plans for new or different role

**Teams**
- Determine skills needed for team operations
- Inventory team members’ skill sets
- Identify skills necessary for the team to function
- Analyze skills gaps and develop team training opportunities

**Bridge the Gaps**

To effectively redesign roles, you must bridge the gaps identified during the analysis. For each process or job role, identify the skills required and the skills gap, then determine the best methods for addressing those gaps—training existing employees, restructuring roles, eliminating roles or recruiting and hiring new talent. Then use the information from the analysis to develop updated job descriptions and to define roles and skills for new jobs and open positions.

**Communicate**

Moving to a shared services model influences employees’ feelings of job security and can impact performance. A critical success factor when redesigning job roles is frequent communication, while being as transparent as possible. The goal for management is to create two-way information sharing with employees. Management uses various communication tools to clearly and consistently share what they know about the vision and the process. Employees have a confidential channel to share concerns, ask questions and determine how the transformation will affect them directly.
Review Process

After completing a role redesign, work with the shared services organization to conduct a post project review of the process to identify lessons learned and areas for improvement. Each transition is unique. Even with experience, there are issues you may not anticipate.

Benefits of Role Redesign

When roles are properly redesigned in the internal customer department, there are significant benefits for the shared services relationship, employee productivity and the company as a whole.

Increasing Employee Engagement

Changing job roles to focus on core skills of employees in the internal customer department gives those team members the opportunity to focus on higher value activities and be more productive and successful. As a result, employees feel increased happiness, engagement and job security while the organization retains talent and minimizes attrition.

Cost Savings

Redesigning job roles to better align with the higher-level tasks in the customer department reduces costs—by minimizing time and effort for the entire process.
Allocating lower cost employees toward transactional tasks frees up higher cost employees to focus on their core job tasks and value added activities, such as bringing in new customers and analyzing data.

Standardization of processes enables savings for the internal customer. It also enables end-to-end cost reductions for the entire global organization, by taking advantage of economies of scale that occur with the removal of duplicate effort and the successful reallocation of job roles.

**Improving Process Efficiency**

The shared services model is designed to improve process efficiency through centralization, standardization and reallocation of tasks by skill and job level.

Standardizing processes, typically those that are repetitive or transactional, is a way to ensure consistency across the organization. Automating business processes also reduces redundancies and difficulties downstream that can result when multiple employees address the same job task.

Dividing up the work by skill level increases the capacity and efficiency of higher cost employees with higher level skills. It also ensures that lower level tasks receive the appropriate level of attention and are accomplished completely, quickly and accurately.

Other benefits include:

- Improved ability to recruit and retain employees
- Higher quality candidates for the new roles
- Streamlined workflow for employees in the established department
- Catalyst for aligning operations within both organizations

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**Case Study: Role Redesign in EMC Global Business Services; The Case of RSA**

*When RSA, the security division of EMC, recognized the need to streamline its Credit and Collections process and lower costs they approached EMC Global Business Services (GBS).*

*The goal: To employ a shared services model to drive the success of the business.*

*GBS assessed the group’s business needs and job tasks and developed a plan to redesign roles within the RSA team by sending work to GBS. This analysis uncovered a mismatch of skills within the team, so employees were redeployed.*

*The roles were fulfilled by a new shared services team—employees hired in both onshore and offshore GBS locations to conduct the Credit and Collections tasks. The entire project took almost one year to complete, but once up to speed, RSA*
saw decreased operational costs in the first six months. Today, the RSA Credit and Collections team is exceeding quarterly forecasts and the manager’s workload has become more manageable.

RSA found that moving to a shared services model and redesigning roles solved the productivity problem and led to improved employee satisfaction, greater engagement and a strong relationship with GBS.

Conclusion

By effectively redesigning job roles in the internal customer team, companies can avert many of the challenges that may accompany a transition to a shared services model. When done ineffectively, this transition can result in poor workforce allocation and process inefficiencies that cost the company more in the long run.

Companies that make the investment to redesign job roles as part of the transformation to shared services get the full benefit of the new model.

EMC has successfully grown their shared services model, retained key staff and increased efficiencies throughout the entire global organization. This was achieved with a strategic approach that included analysis, planning and execution of role redesign.