



cutting through complexity

Nordic Shared Services and Outsourcing Pulse Survey 2015

The Era of Global
Business Services

PROCESS OWNERSHIP

IT & ENTERPRISE SYSTEMS

DATA & ANALYTICS

CUSTOMER CARE

Authors



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Tone is a Senior Manager and Head of Shared Services and Outsourcing Advisory at KPMG Norway. With a background as CFO, she has deep operational experience from the finance function, and has been leading the way in various Shared Service journeys over the last twenty years. She has hands-on experience from multifunctional set-ups and optimising support functions within IT, HR etc., in addition to Finance. With her technical insight, Tone has comprehensive knowledge of how systems can be an enabler and the foundation for driving consistency in the GBS organisation, and supporting business decisions. She is frequently used as lecturer within GBS and Shared Services, as well as for Data & Analytics related topics.

The Nordic Pulse Survey is based on input from KPMG's senior sourcing advisors in the five Nordic countries, combined with Nordic executives from selected outsourcing providers. For a full overview over contributing countries and participating service providers, please see the final page of this report.

Themes

Process ownership:
Owning and improving processes end-to-end

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IT and enterprise systems:
Building a solid foundation for improvement

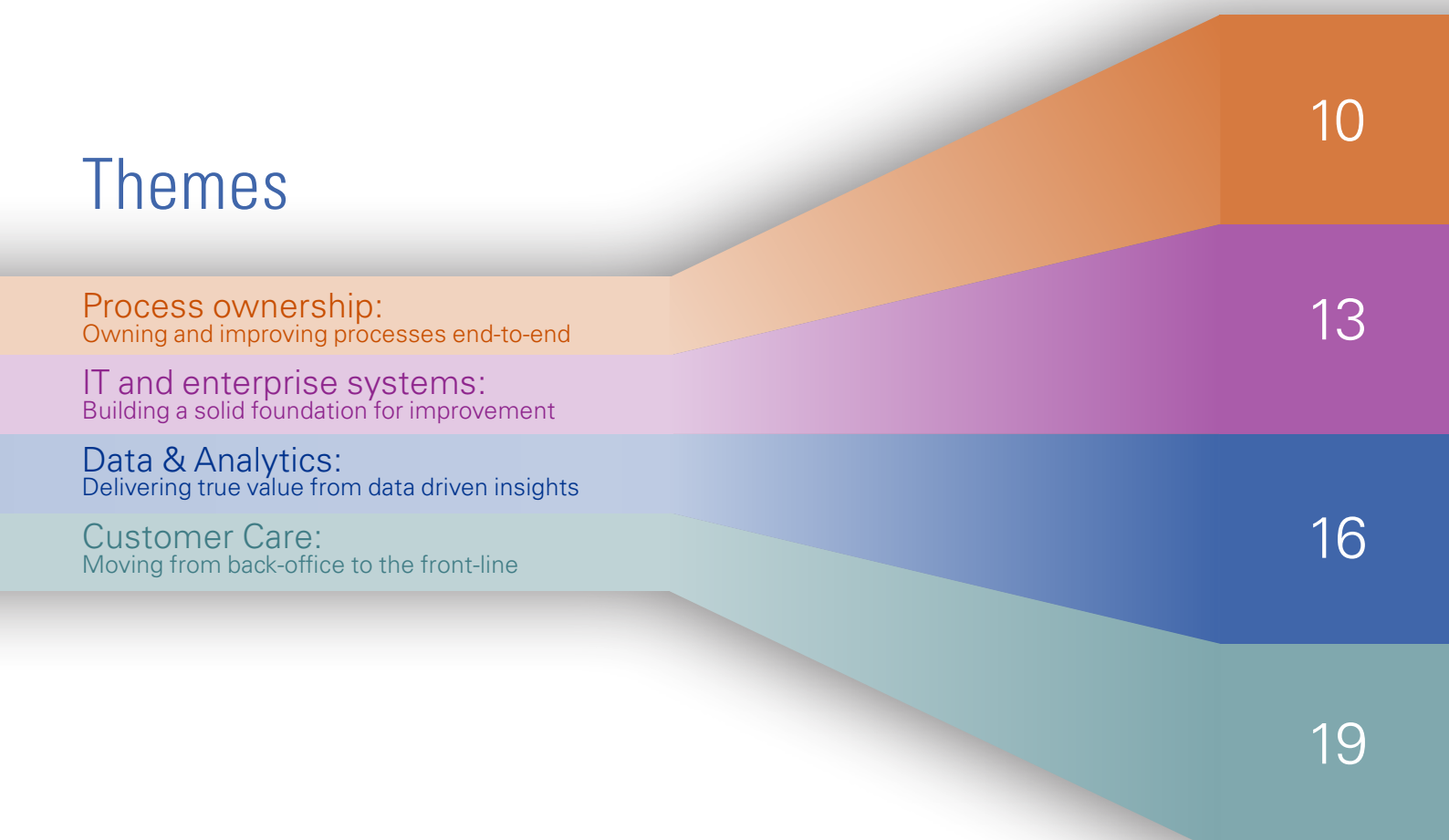
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Data & Analytics:
Delivering true value from data driven insights

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Customer Care:
Moving from back-office to the front-line

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Introduction

Welcome to the Nordic Pulse survey. Over the last 11 years, KPMG has been surveying service providers and its advisors globally to get the latest pulse on the global shared services and outsourcing markets. Starting in 2014, KPMG conducts a separate Nordic Pulse Survey to ensure that we combine findings from a global level with an understanding of the local market and context. We do encourage you to also read the Global Pulse Survey, which you can find online at <http://www.kpmg-institutes.com>.

This report provides you with the latest trends within shared services and outsourcing, as well as reflections on several key topics from a service delivery transformation point of view. The data clearly shows that Nordic organisations are moving from a traditional silo-based and transactional shared services and outsourcing focus, to more of a holistic end-to-end approach, and gradually adapting what we refer to as Global Business Services (GBS). We have in particular identified four topics, that are either emerging as new trends, or that have already made it to the top of Nordic GBS leaders' agendas.

Process ownership has been discussed for many years. But it is now more relevant than ever before, as organisations build delivery models where processes span across locations and channels. A successful GBS set-up needs a strong process focus, both in terms of design and execution, and it should preferably break functional silos and operate end-to-end.



Download the Global Pulse Survey



Key enablers for efficient operations and reporting are **IT and enterprise systems**. This is not only about operating on standardised ERP platforms with as few instances as possible. But also about making use of innovative technologies, such as cloud, social media and virtualisation, in a smart way.

When a certain level of IT standardisation has been reached, organisations can leverage on the great potential of **data and analytics** in a GBS context. By tapping into the rich amount of data existing within a GBS, actionable insights can be provided not only to the GBS, but also to the wider organisation, which shifts focus from pure cost efficiency to true value creation.

Traditionally, most shared services and outsourcing efforts have been focused on back-office. But we now see an increased appetite for also looking into **customer care** activities. This puts additional requirements on the design and implementation of GBS. By truly understanding

customer journeys and interaction points, GBS can not only drive cost out of the front-office, but also enable increased customer experience, and even directly impact top-line growth.

Throughout the report, we explore these trends in detail, through a combination of the latest findings from our Pulse Survey and by sharing our point of view.

We hope you find value and inspiration from reading this report. Should you like to discuss the overall trends or your specific situation further, please do not hesitate to reach out to us or your local KPMG contact.



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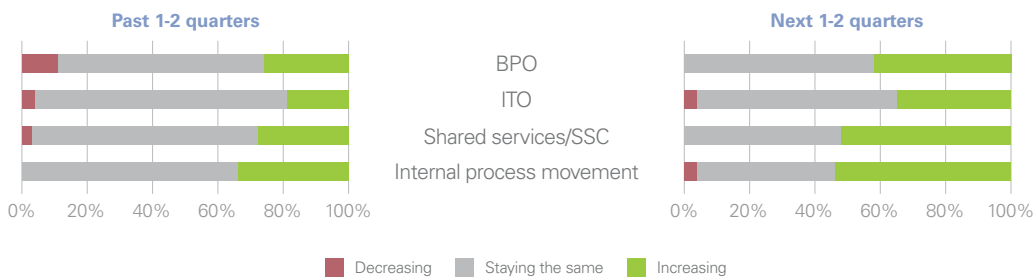


Market outlook

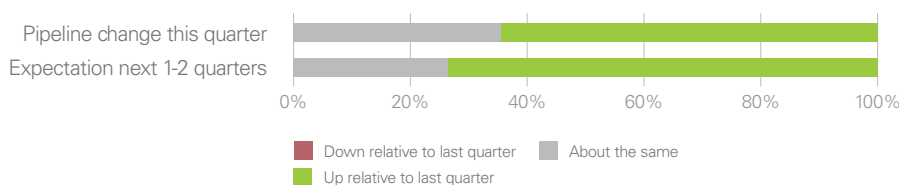
The Nordic market is seeing a continued increasing demand for improved service delivery models. KPMG advisors predict an increase across all models during the first half of 2015 compared to the end of last year. The across the board increase indicates that there is no one size fits all delivery model. Many organisations are seeing benefits with delivering certain activities in-house, while letting different service providers take care of the areas they are most suited to handle. It is also a sign that organisations want to maintain a healthy balance of different delivery models instead of putting all their eggs in one basket. Captive models have traditionally had a stronger demand within the Nordics than outsourced ones. However, outsourcing is now picking up pace with a significant increase. The appetite for outsourcing is also clearly shown in the service providers' pipeline projections, with two thirds confirming a pipeline increase in 2015 and an even larger share projecting further increased demand throughout the year.

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Advisors: Demand levels by service delivery model

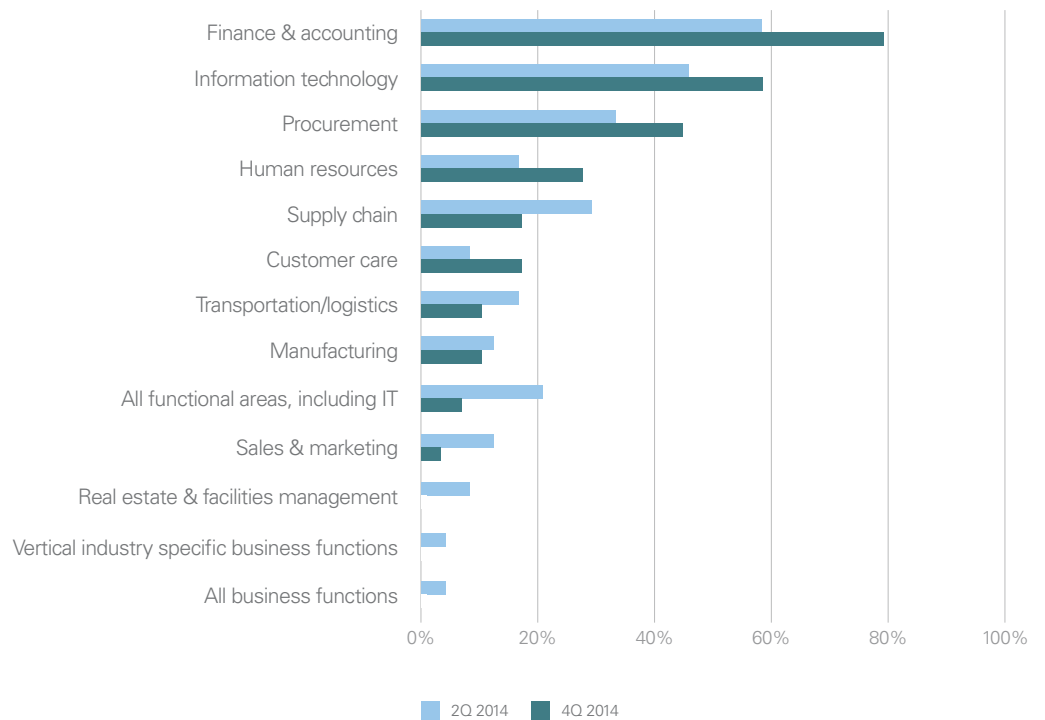


Service providers: Current and projected pipeline



In terms of demand per function, the focus on the functions that have traditionally been the first pick for service delivery model improvements, such as Finance & Accounting, Information Technology, Human Resources and Procurement, is growing even stronger than last year according to KPMG’s advisors. Service providers are not perceiving the same increase within these functions, which indicates that parts of the change efforts do not involve an outsourcing component. This finding is aligned with experience from the current client base, where organisations that have outsourced their transactional activities over the last years are now moving focus to more high-end activities, which they tend to keep in-house, e.g. in captive Center of Excellence models.

Advisors: Top functional focus areas for effort to improve service delivery performance and/or reduce costs



Market outlook

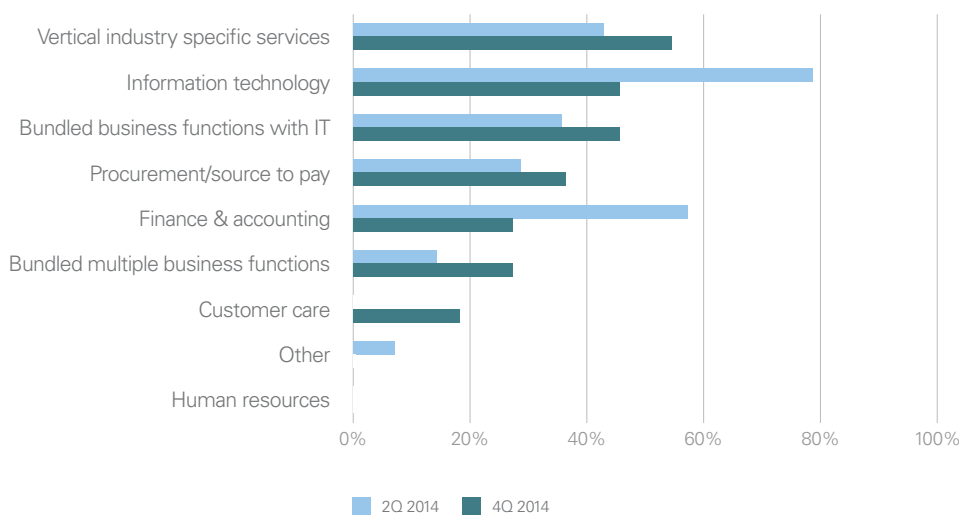
Among the service providers, there is an increased focus on bundled functions and vertical specific services. This also supports the observation that the initial wave of outsourcing, which covered functional specific activities but with limited industry flavour, has passed. And many service providers are now gearing up to support an increased end-to-end and industry specific focus. This will be a key competitive factor going forward. Most service providers can handle transactional activities of a generic nature very well. But the providers that are able to cater for industry-specific needs, and also help organisations to deliver measurable outcomes and business value across functions, will have a strong advantage going forward.

One area where both advisors and service providers are seeing an increase is customer care. The increased interest in not only improving back-office delivery models, but also moving focus onto the front-office, is further analysed in a separate chapter of this report.

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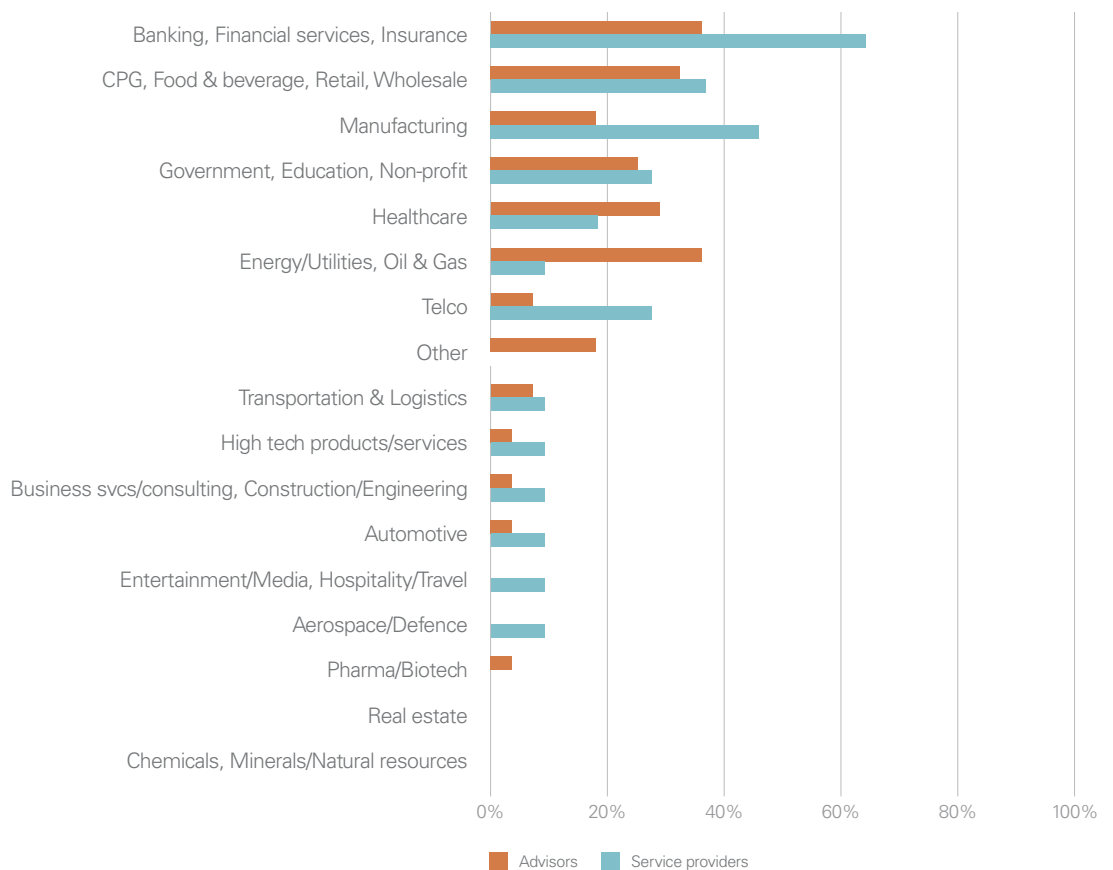
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Service providers: Strongest functional areas of demand



When it comes to industries with the largest focus on service delivery improvements, efforts are spreading out more evenly across industries than before. This shows that organisations across a wide range of different industries have drawn inspiration from the ones who have traditionally applied shared services and outsourcing delivery models. This trend combined with the shift from generic to industry-specific processing imposes even greater requirements on advisors and service providers, who do not only need to be able to deliver more industry-specific solutions, but they also need to do it for an increased number of industries. Providers are cautioned, however, to not spread themselves too thin and pursue across all functions and industries. They are better served to develop industry and functional specialisation so as to more realistically have the skills and resources to deliver these more complex services in a high quality fashion.

In which industries are you seeing the biggest demand?

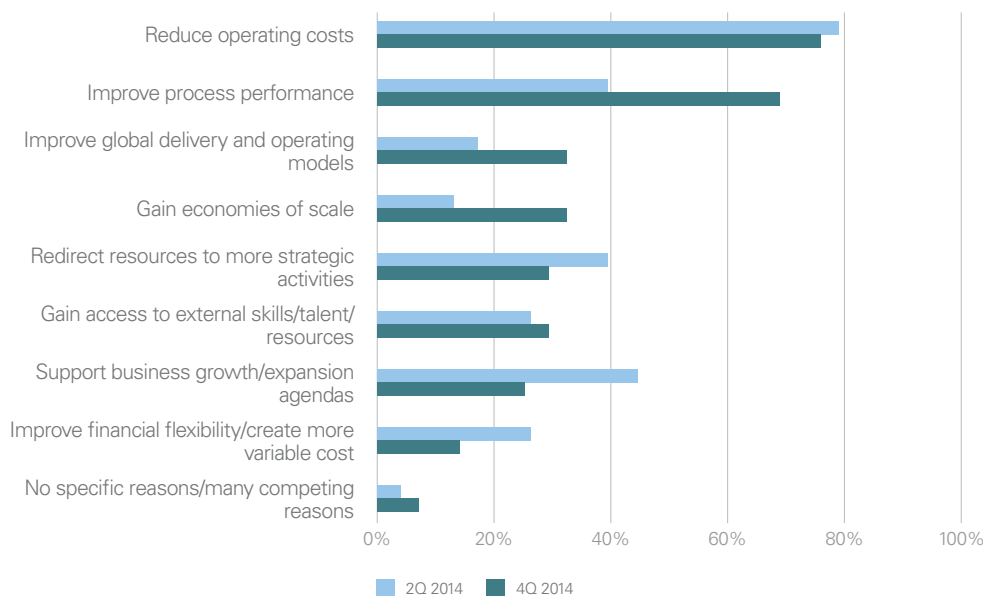


Moving towards Global Business Services

In order to understand which service delivery models organisations are pursuing, and what is driving their selection, it is important to understand the underlying reasons for venturing into process change efforts. Different models serve different purposes. KPMG's advisors were asked for the top drivers for undertaking change efforts in 2015 among their client base. Not surprisingly, a big share of the organisations still see operating cost reductions as a key driver. However, this is closely followed by process performance improvements, which has almost doubled since last survey. This can also be seen among the top initiatives planned for 2015, where more transformational initiatives, such as re-engineering core business processes, and investing in new information technology, are high up on the list.

“**Transformational initiatives, such as re-engineering core business processes, and investing in new information technology, are high up on the list.**”

Advisors: Top drivers for undertaking change efforts



It is critical for the different players in the market to understand those ambitions, and help organisations design delivery models which enable the desired transformations. Shared services and outsourcing efforts can no longer only zoom in on selected transactional activities and focus on consolidating and moving those to low cost locations. A much more holistic view needs to be taken, where organisations look at processes end-to-end, and design models which span across functions, enabling outcome-based improvements and true analytical insights. This will be a challenge for both service providers and shared service center leaders who are used to operating standard transactions as efficiently as possible, but with limited, or no, cross-functional collaboration and outcome focus. However, many players are stepping

GLOBAL BUSINESS SERVICES

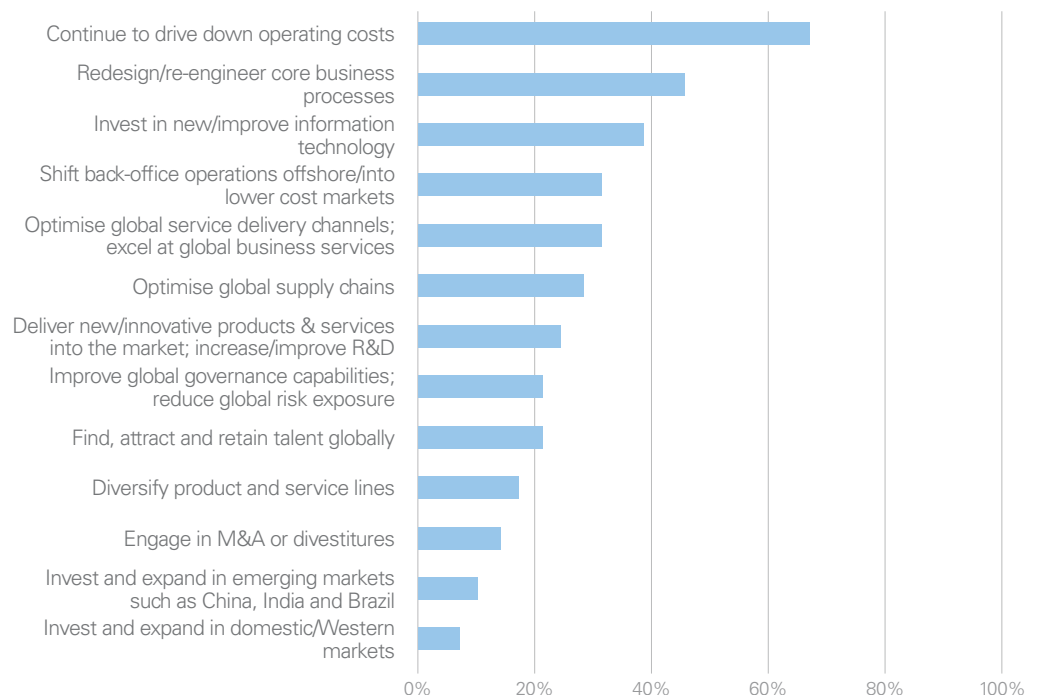
GBS is an integrated platform delivering enterprise business services which are both multifunction and multisource to drive efficiency and business outcomes evolving with market and company needs. GBS focuses on optimising the mix of human capital, service delivery model optimisation, process innovation, and information technology resources to improve delivery effectiveness and efficiency across various type of services, including both front-line and back-office. This is done on an enterprise-wide, cross-functional basis in alignment with the broader firm business strategy.

up to the game, which is evidenced by the increased focus on end-to-end process ownership, enterprise systems, data and analytics and even on core customer-facing activities. These four topics are all areas which we consider critical in 2015, and we have therefore provided separate sections for each of these topics, in which we combine reflections on the latest trends with our point of view based on past and ongoing initiatives.

Overall, organisations are starting to embrace the Global Business Services (GBS) concept, and realising the importance of moving towards delivery models which enable end-to-end value creation. This is not something that happens overnight, but it is a journey that gradually helps organisations to deliver higher quality services both internally and externally. A few years back, the only *raison d'être* for most shared services and outsourcing leaders was cost efficiency. But today they are often being asked by their executive teams to deliver measurable value, and GBS is in many cases seen as a platform for transformational efforts, which were previously not possible in a fragmented process and system landscape.

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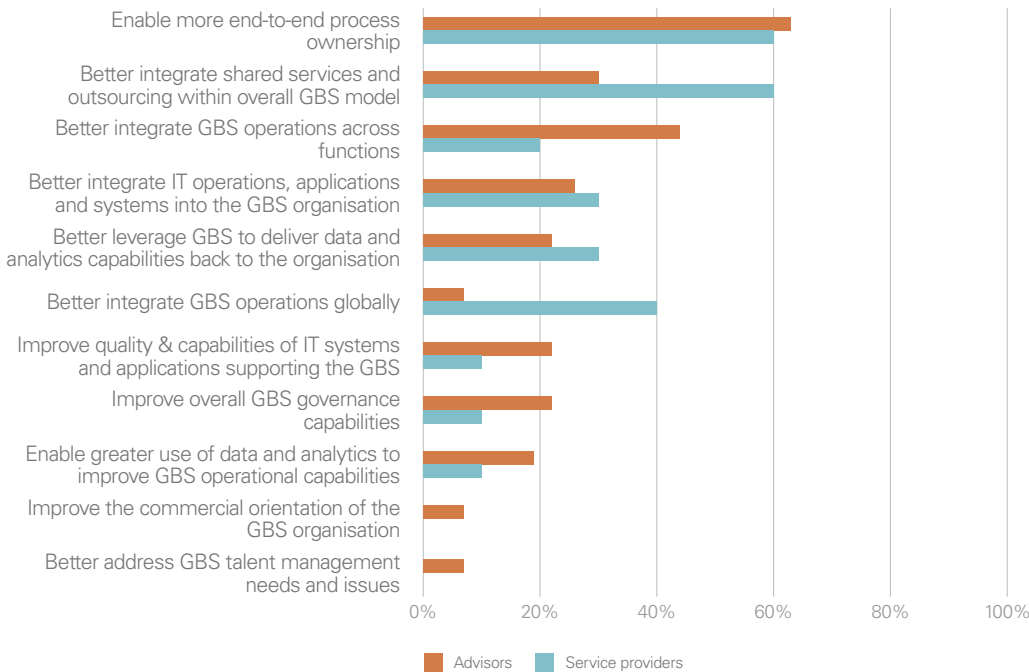
Advisors: Top initiatives in 2015



Process ownership

Process ownership is high up on the GBS agenda, and both advisors and service providers consider this the key focus area for currently ongoing change efforts among their client base. As GBS organisations are changing – often by taking on more complex activities, while at the same time adding new functions – it is critical to consider the role of the process owner and adapt it to the changing environment. What are the responsibilities of a process owner? Where should the process owner be located in the organisation? How can a process owner design and control processes which span multiple delivery models and locations? While there is no one-size-fits-all solution to these questions, there are some clear trends in the Nordic market.

Specific to global business services/GBS, what are the key focus areas and top priorities in your client organisations’ ongoing change and improvement efforts

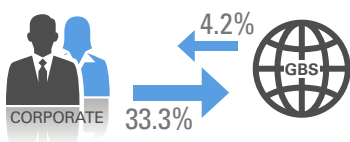


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Trends

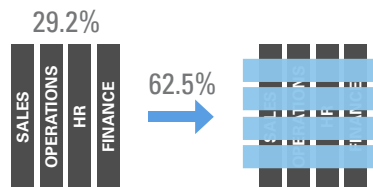
Where to locate the process owner is an aspect which is often debated. Some organisations prefer to have their process owners as part of the corporate organisation in order to be able to maintain a helicopter view of the process landscape, while others place them inside the GBS organisation, bringing them closer to where a large part of the processes are actually executed. KPMG advisors are seeing a clear net flow of process ownership from corporate into GBS. This is also in line with the increased importance of the GBS organisation. With more organisations moving from single-functional transactional shared services or outsourcing efforts into outcome-based GBS models with an end-to-end focus, it is often natural also to move the process owners into GBS.

ORGANISATIONAL LOCATION



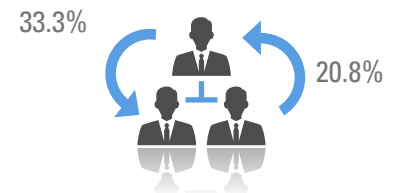
There is a strong move of process ownership away from corporate functions to GBS.

PROCESS SCOPE



There is a clear tendency from functionally oriented process ownership towards end-to-end ownership.

ORGANISATIONAL LEVEL



There are intentions both to move ownership closer to the executional front line and towards senior management.

Another important aspect is how to structure ownership from a functional perspective. Should the process owners report to functional leaders and focus on the parts of the processes which are under their direct control, or should they take more of an end-to-end approach and try to bridge the often existing functional silos? Almost two thirds of the KPMG advisors are seeing trends of moving from functional to end-to-end process ownership among the clients they work with.

While there are clear trends of moving process ownership into GBS and focusing on end-to-end, many organisations still seem to struggle with identifying the optimal level for process owners in the organisation. There are a number of organisations pushing process ownership towards more senior people, while an even larger number is moving it closer to the delivery teams. This reflects the challenge of creating process owner roles which are both capable of making decisions about their respective processes while still having an understanding of the day-to-day process execution. Organisations often solve this by creating a layered process owner model with more junior process specialists reporting to global process sponsors at an executive level.

Process ownership

Our point of view

With organisations moving up the GBS maturity curve and starting to combine different delivery models and functions, process ownership has become more important than ever in order to drive enhanced outcomes with an optimised resource utilisation. While the process owner role has existed over a long period of time in many organisations, it has moved from being nice to have, where many leaders struggled to understand the *raison d'être*, to being the critical glue that ties a process together and ensures that functions and channels strive in the same direction. Process ownership does not only ensure aligned process design and delivery but also enables additional value-adding efforts, such as advanced process analytics, which would not have been possible in a silo-based model. Process owners are also key enablers for the increasingly popular harmonisation ambitions, such as alignment of ERP systems or master data management.

KPMG recently conducted research on leading organisations' GBS efforts, and found a clear correlation between GBS maturity, process ownership and financial returns. Key differentiators for the more mature organisations were aspects such as a strong solution focus across functions and channels, deployment of a formal continuous improvement methodology and strong executive sponsorship.

The most optimal organisational design will depend on the context and culture of the company. It is crucial that the process owners can drive change across functions, but whether that is best managed through a matrix set-up, multi-layer structures or any other integrated organisational model is less important. The key is to identify the greatest needs of the organisation, and use those as catalysts for implementing and enabling a strong process ownership set-up. A strong focus on change management and address political issues and pushback against these changes as they are introduced is also critical.

Once having successfully established a process ownership structure, it is important to develop and enhance the role in a pace which is adapted to the organisational environment and the overall GBS ambitions. The role often evolves from process design and implementation of change initiatives via deployment of measures and a continuous improvement methodology to end-to-end accountability of process performance. Process ownership is a critical component of an organisation's ambitions to move up the GBS maturity curve, but it has to be seen in conjunction with the overall GBS efforts in order for the organisation to succeed.

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IT and enterprise systems

IT and enterprise systems are key enablers for efficiency, integration, process improvement and the ability to extract insights about actions that will create value. Organisations that are open to technology-driven opportunities are more able to provide the right information at the right time to the right people and thus obtain a competitive advantage, both at the strategic and operational levels.

Trends

Both service providers and KPMG advisors in the Nordic region believe that maturation of or greater access to innovative technologies (e.g. cloud, social media, virtualisation) is the area that will have the highest positive impact on our clients in 2015.

This is in line with what we see in the global results as well, and this reflects that IT is a key enabler for a solid GBS model as well as the potential benefits anticipated from disruptive technologies.

However, at the same time, both groups also agree that inadequate or obsolete IT infrastructure and systems will be the main challenge in successfully undertaking these initiatives. At first sight, this might seem contradictory, but the findings are not surprising. Legacy IT systems are considered the largest hurdle in re-engineering business processes, accessing data and continuing to drive down operating costs. Real improvements will require high investments, it involves risk, and it will take time before the organisation will be able to capitalise on the investment. We see that very few Nordic GBS organisations are operating on a common Enterprise Resource Planning (ERP) platform, and both KPMG advisors and service providers in the Nordics consider this the main challenge for improvements and change.

Accordingly, it is not surprising that the top initiatives for 2015 in the view of the service providers will be investment in new or improved information technology, such as enterprise systems, business intelligence, cloud and social media. Where KPMG advisors in the Nordics expect the main increase in investments in 2015 will be within data and analytics, the service providers have an even stronger belief in increased investments in innovative technologies like social media and cloud software and services. The perception among service providers is that the gap between legacy IT and new disruptive technologies will increase. This could be explained by the IT background of several of the service providers but also by the fact that they experience the benefit from new technology for outsourcing services.



IT and a standardised ERP platform is a key enabler to provide the foundation for driving consistent operations and reporting.

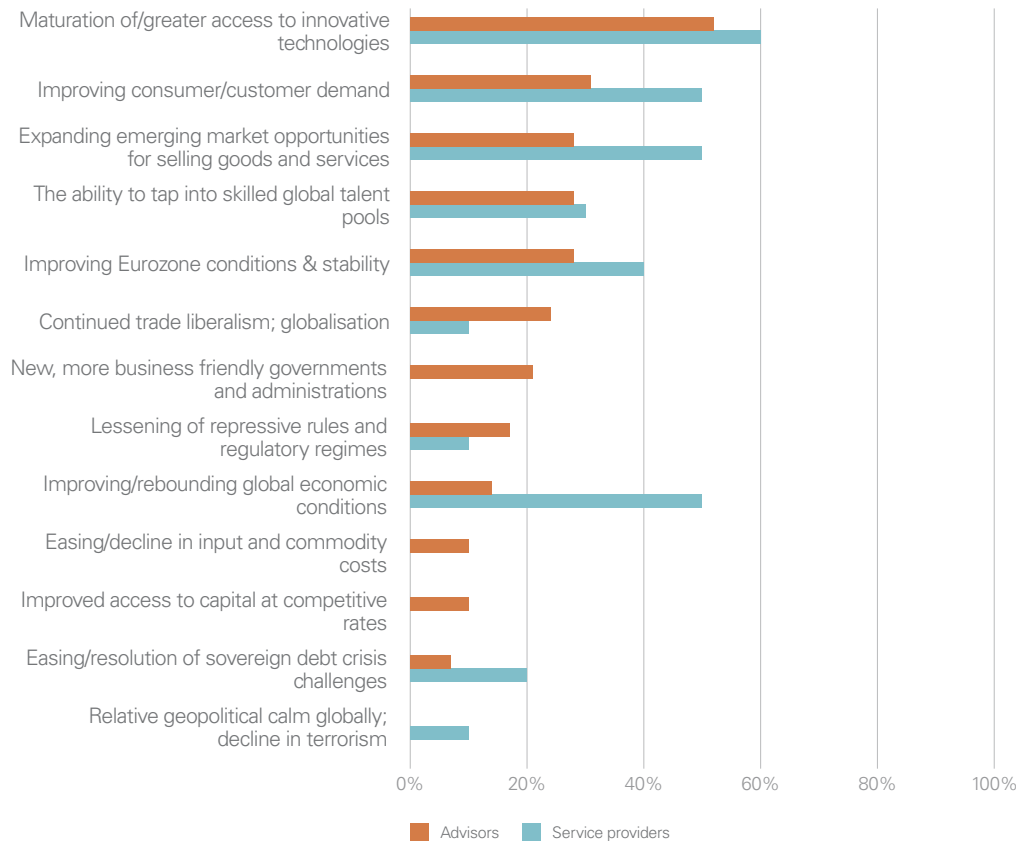


IT and enterprise systems

Our point of view

From a GBS perspective, we see that IT and a standardised ERP platform with as few instances or versions of the ERP applications in use as possible is a key enabler to provide the foundation for driving consistent operations and reporting. Increasingly, GBS organisations must deploy a more standardised IT application infrastructure to achieve desired service delivery improvements, and the frontrunners have invested heavily in the past and can now capitalise and move up the maturity ladder. While there is no doubt that delivering a successful GBS solution is made easier when a standard global system is in place, we also see that new innovative technologies can enable improvements. There is, however, no reason to wait for a harmonised ERP platform in order to implement and benefit from GBS. On the contrary, our experience is that GBS can be used as a platform for alignment, and be the driver for change.

Which of the following do you think will have the biggest POSITIVE impact on clients' operations in 2015?





A reduced set of ERP platforms and instances is ideal; however, we see that enterprises are increasingly using cloud application services to enable interconnectivity and provide supplemental services. While corporate ERP systems remain the foundation, integration of diverse IT solutions through cloud applications can enable a seamless and comprehensive set of applications to enable one single source of data, support end-to-end processes and consistent customer perception. Cloud computing has an important role to play as it enables management of IT infrastructure capacity to meet the needs of the business at particular points in time. This enables faster time to benefit, lower cost as well as consistent user experience.

The potential benefits of new and innovative technologies are almost inconceivably huge, and we see that disruptive technologies can change the game for businesses, creating completely new products and services we could not even have imagined a few years back. KPMG experiences that the leaders will move early to capture the benefits and ensure that their organisations look ahead. However, there is risk involved as well. If you are considering purchasing the latest and greatest system, you should be carefully debating why you are embarking on this information technology journey. Will it lead to performance improvement, increased profitability or support compliance? Our experience is that the probability of enterprise alignment is always substantially higher when technology investments are tied to measurable business value.

Data and analytics

Executives are looking for fast, actionable insights that will help them grow their business, improve performance and manage risk. This is the same in the Nordics as globally, and greater access to data creates value beyond cost cutting and operational efficiency. In KPMG, we see that those organisations that are able to leverage their data to create real and actionable insights are already gaining clear competitive advantages in their markets, reducing their risks and managing their costs.

Data and analytics is a dimension where companies can really benefit from a GBS structure that supports and drives proactive decision-making. GBS services are a hub for data and analytics services for all lines of business, providing standardised platforms and consistent methodologies, acting as the single source of truth for both internal and customer facing analysis.

Trends

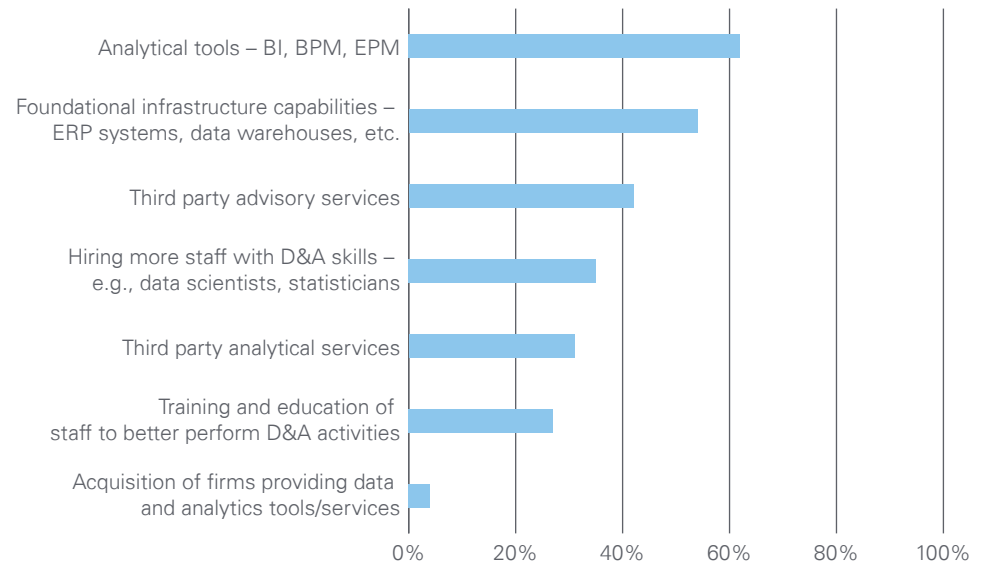
Data and analytics is seen as a strategic opportunity by most companies and is included in the top three of the ongoing change and improvement efforts. Improved integration across functions and end-to-end process ownership are currently at the top of the list, but the awareness of the high value potential within data and analytics is growing. Looking into the near future, we expect to see that the opportunity to better leverage the GBS organisation to deliver data and analytics capabilities and services back to the organisation as well as to enable greater use of data and analytics to improve GBS operational capabilities will climb on the priority list. For most GBS organisations today, however, the first goal is to improve data and analytics capabilities to better manage GBS operations themselves.

The service providers rank their clients as rather immature in using data and analytics to manage their collective outsourcing/GBS efforts – actually it's the dimension with the lowest score when assessing maturity. This could be explained by the fact that, in general, the service providers are closest to the transactional services, but they also see this as a future growth area, just as KPMG's advisors do.

The trend of increased importance for data and analytics is apparent when looking at the expectations for 2015, where two of the top three success factors and capabilities are related to business intelligence and harnessing "big data" as well as IT systems and capabilities in general.

The strategic importance of this area is also reflected in the investment plans as data and analytics is the only area where advisors expect increased investments in 2015. This trend is also seen globally, but is even stronger in the Nordics. When looking into the data and analytics area, investments are expected to be made in analytical tools like BI, BPM, EPM, etc., as well as foundational infrastructure capabilities like ERP systems and data warehouses. Building up own capabilities within data and analytics either by hiring or acquiring is not experienced as high priority among Nordic companies. KPMG’s experience is that, while systems and technologies are critical enablers of a data and analytics strategy, it is equally important that organisations have people who know how to work with data and, more importantly, how to make sense of it.

Where will clients most heavily invest in data and analytics to support their GBS/ Shared services/Outsourcing efforts over the next 24 months?



Data and analytics

Our point of view

The execution of business strategies is often hampered by a lack of reliable information. In today's turbulent and unpredictable world, it is more important than ever to gain continuous market insight and have the agility to react quickly. After years of evolving the service delivery models, we are entering into a phase where many organisations have reaped the initial benefits from consolidations and relocations and are gradually shifting towards a focus on values. By tearing down silos and designing integrated, multifunctional and multichannel delivery models, GBS is opening up opportunities to enable growth agendas and provide data-driven business insights. Our experience suggest that organisations that put their customers at the heart of their data and analytics strategies will be the ones that reap the greatest rewards.

In the past, the data and analytics strategy has largely been focused on improving reporting and compliance, but organisations are now starting to recognise the value that data and analytics can provide to their growth strategy in terms of deeper customer insights. Growth really starts and ends with the customer, so if you're not able to get a 'single view' of your customers, you cannot see the full picture. KPMG experience that data-driven organisations that are unburdened by siloed data are able to develop a 'single view' of their customers that allows them to better understand the needs and values of their customers throughout the life cycle. As a result, they are not only able to better anticipate and rapidly respond to their customers' needs, they are also able to use these insights to quickly enter into new market segments and seize growth opportunities as they emerge.

In order to break down the silos, organisations must urgently focus on improving processes to share data, best practices, capabilities and strategies across the organisation. In KPMG, we experience that leading GBS organisations are moving towards platforms that enable predictive and proactive decision-making, where the dimensions of a mature GBS organisation are key enablers. With greater access to data, analysis can move beyond operational efficiency and cost cutting within GBS to address corporate-wide issues, such as customer insight, process optimisation and compliance.

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Leading GBS organisations are moving towards platforms that enable predictive and proactive decision-making.
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Customer care

Shared services and outsourcing efforts have traditionally been focused on back office activities. This is something which will remain in the spotlight for a foreseeable future. However, at the same time, there is an increased interest in applying a GBS model also to customer facing activities, as the GBS design principles equally apply to front and back office. While there are significant benefits with operating customer care through GBS, it is important to understand how a GBS operating model impacts customer interaction and the journeys customers are going through.

Trends

KPMG advisors and service providers in the Nordic region all see an increased demand for including customer-facing processes in the GBS delivery models. The increase has happened over the last year, and the ratio seeing it as top priority now even exceeds the global ratio. The language barriers, which have traditionally been holding Nordic organisations back from bigger customer care consolidations, are getting less impeding with the increased usage of e-mail and other digital channels combined with the enhanced language capabilities in Eastern Europe.

The appetite for inclusion of customer-facing activities into GBS is most likely also driven by the strong end-to-end focus which has appeared over the last year. In order to design and operate processes in a true end-to-end manner, it becomes critical also to include the parts of the processes which have a direct customer interface. This is particularly relevant for processes where downstream activities are currently operated in GBS, while the upstream customer interaction is executed locally, since it is hard to drive significant performance improvements when only controlling the last part of a process. An example of this is to increase the Order-to-Cash process scope from only handling accounts receivables to also including order taking and processing.

This is a trend which is expected to continue over the coming years. What remains to be seen is how organisations balance the use of captive versus outsourcing for their customer-facing activities. Needless to say, customer interactions are often seen as more important to an organisation than pure back-office transactions, which makes them more sensitive to move to third parties. However, many service providers are managing customer contact today and have built up experience in, and capabilities for, optimising interaction across channels and are better able to do so than clients could themselves. So it is important for organisations to seriously consider which delivery model fits their customer care the best.



Each change to an organisation's customer care delivery model should take the outset in the desired customer journeys, and particularly in the customers' moments-of-truth.



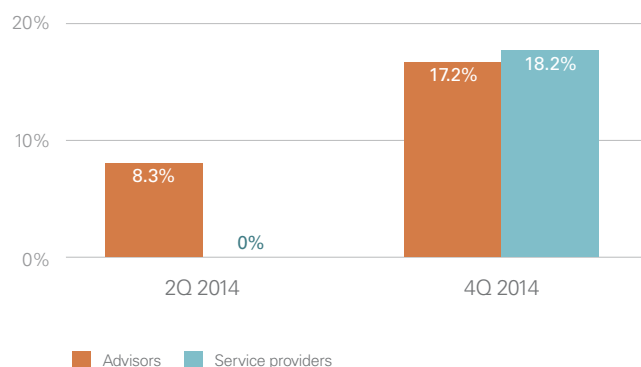
Customer care

Our point of view

In today's competitive environment, where there is an endless amount of providers of similar products and services, and where our technology allows us to instantly share our views and experiences of organisations, customer experience has become more important than ever. Thus, it is of utmost importance to carefully consider the customer impact of service delivery model transformations. While we for back-office processes tend to decompose activities into different delivery options based on the nature and requirements of each activity, we need to take a more customer-oriented approach when moving towards the front-office. Customers do not, and should not, care about how an organisation has structured their processes. They do, however, care about getting a seamless and consistent experience.

A customer goes through a journey with an organisation. This journey consists of a number of touchpoints which could involve different channels, such as online self-service, e-mailing, calling or even meeting with representatives of the organisation face to face. Any attempt to optimise one of these interaction points in isolation will most likely fail as the customer will judge the organisation based on the end-to-end experience. Designing an excellent order taking interaction point will not impress a customer if the company later on cannot answer questions about the order or fails to deliver as promised.

Ratio seeing customer care as a top priority for service delivery improvement efforts





Each change to an organisation's customer care delivery model should take the outset in the desired customer journeys, and particularly in the customers' moments-of-truth, i.e. the points along the journey which have the largest impact on the customers' total experience. Even if the objective of the delivery model adjustment is pure cost efficiency, no organisation wants to impair the customer experience, which could very well be the result if not taking a customer-centric approach to the transformation. Once the journeys are defined, the organisation can then build an underlying operating model, including adjustments to the delivery model, which supports the journeys and touchpoints.

Despite the warning flags raised in terms of the delivery model design, it is definitely worthwhile looking at customer care in a GBS context. Building a solid customer care model can bring immense benefits. Apart from allowing for a more cost-efficient way of handling interactions while at the same time giving customers a more harmonised experience, it paves the way for significant enhancements of existing channels, which would have been impossible in a more fragmented set-up. Perhaps most importantly, it creates the foundation for data-driven insights, which enables the organisation to understand their customers and their needs and thus continuously improve experience while at the same time identifying behavioural patterns which can quickly translate into cross- and up-selling opportunities. A well thought through customer care model will be a key differentiating factor going forward, and if not already being considered, it should be put on any GBS leader's agenda.

Participating service providers

- Accenture
- Atos
- Cognizant
- CSC
- Fujitsu
- Genpact
- HCL
- HP
- TCS
- Wipro

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