

# A Relational-Based Approach to Transformational Shared Services



CACUBO

# SIGN IN

Use the app to  
sign in for CPE



# Your OHIO Business Service Center Speakers



**Kelly  
Broughton**  
Director of  
Operational  
Purchasing and  
Travel



**Moriah  
Hudspeth**  
Senior Director  
of Finance and  
Budgeting



**Heather  
Krugman**  
Executive  
Director



**Sylvia  
Mickunas**  
Director of  
Operational  
Improvement

# Poll Questions

1. Does your institution currently have a shared services center for finance, purchasing, and/or hiring services?

Yes

No

2. What is or would be the biggest challenge to a successful shared services center at your institution?

Decentralized unit resistance

Centralized unit resistance

Leadership buy in

Staffing constraints

Financial constraints

Staff boredom with repetitive tasks

Other



# Overview of the OHIO Business Service Center

# About Ohio University

- Southeastern Ohio
- Public R1
  - 9 academic colleges
  - College of Medicine
- 28,000+ students including online
  - 5 regional campuses
  - 2 extension campuses
  - Online (over 7300 students)
- Highly decentralized



# History of the OHIO BSC



# Building a Scalable Structure

## Financial Planning and Operational Accounting

- Administrative Budgets
- Smaller Academic Budgets
- PTA
- Transfers
- Revenue
- UBIT
- Management Reports
- Forecasts
- Internal Billings
- Monthly Transactions
- Oversight Functions for FP&OA
- Process Contracts

## Operational Purchasing and Travel

- Separate Tracks Focusing on Academic/Non-academic Issues
- Bobcat Buy/SciQuest
- Concur
- POs
- Process Contracts
- Pay Suppliers
- Request New Suppliers
- Make Travel Arrangements
- File Expense Reports
- Request and Reconcile Travel Advances
- Process PCard Exceptions
- Reconcile PCard on Behalf of Cardholder
- Oversight Functions for P&T
- Reimbursements

## Employment Coordination

- Human Resources Forms
- Other Employee Services
- Create Job Postings
- Create Advertising
- Schedule Interviews
- Coordinate Travel

## Process Improvement

- Technology
- Continuous Improvement
- BSC Training
- Knowledge Base
- OHIO Ready Staff Reinstated

# OHIO BSC Strategy

Emphasis on  
continuous process  
improvement

Workflow System  
Change the way we  
look at approvals  
and using complex  
systems

Multiple phasing for  
purchasing/travel,  
HR, operational  
finance, etc.

Organic vs. Big  
Bang  
Incremental doesn't  
= slow

Adaptive, flexible,  
front-end solution  
oriented

Pilot areas that  
WANT to work with  
us

Need some budget  
flexibility

Develop Local  
Talent

Career paths

Retain operational  
knowledge

Fulfill commitment to  
job stability

Competency-based  
training

Reinstitute OHIO  
Ready Staff

# OHIO BSC Vision:

*To be the most trusted unit on campus*

**T** Thoughtful, Transparent, Tenacious

**R** Reliable, Relational, Respectful

**U** Understanding, Unified, Unparalleled

**S** Strategic, Sustainable, Stewardship

**T** Timely, Thorough, Team-Oriented

## Customer Satisfaction

Purchasing and Travel

**92%** Highly Satisfied or Satisfied

All BSC Areas

**96%** Highly Satisfied or Satisfied

Customer Quote:

*"This system is SOOO much better than what existed before. This was not cumbersome; it was actually service. The people I worked with were helpful, not annoyed bureaucrats. Keep up the good work."*



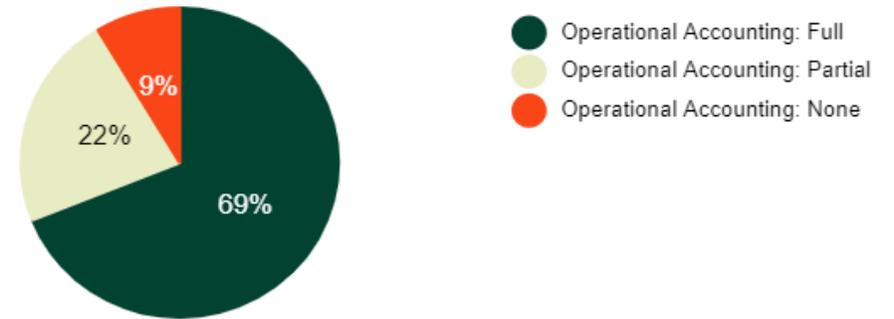
# Metrics: Dashboard

## Percent of Units Served by Service

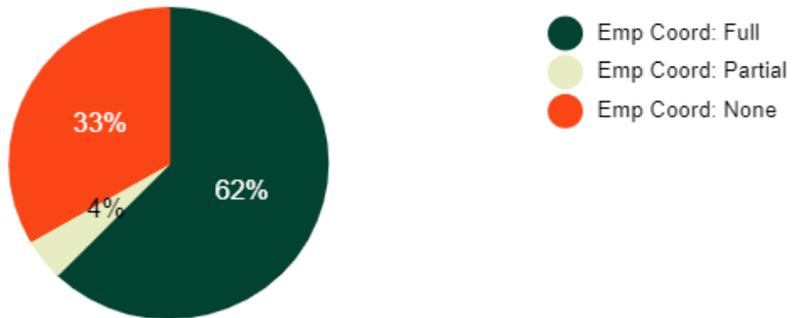
Budget Services



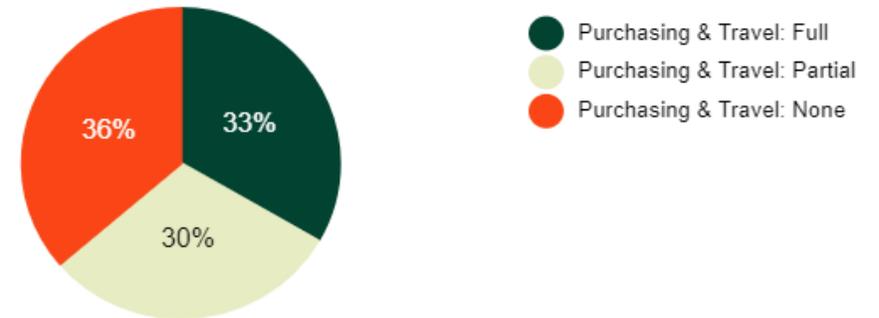
Operational Accounting Services



Employment Coordination Services



Purchasing & Travel Services



# Metrics: Examples of Efficiencies

**Use of the tech  
reduces time in  
system by  
~2 days**

**Created  
templates and  
standard reports  
for ~20% of  
campus budgets**

**Reduced  
workflow for  
one college  
by 50%**

**Eliminated  
unnneeded forms  
(created back-end  
reporting)**

**Specialists for  
travel, student  
reimbursement,  
software, etc.**

**Internal audit monthly  
findings reduced by 79%**

**Legacy systems  
abolished due to  
consolidation of  
tech = 3+**

**Increased transactions for  
all units in BSC by 20%  
with existing FTE  
(savings ~\$213K)**

**Absorbed  
purchasing and  
travel work from  
smaller units with  
no FTE transfer**

**Catalyst for  
changing  
processes and  
policies that equal  
hundreds of hours  
of work**

# OHIO BSC Employee Morale

Did you know . . .

93% staff\* extremely (87%) or moderately (6%) satisfied working in BSC.

99% of BSC employees have been previous employees somewhere on campus prior to OHIO BSC. We are building career ladders and training staff who have strong historical knowledge and long-standing relationships across campus.

30% of staff promoted since 2023

100% of staff extremely (90%) or moderately (10%) satisfied with manager

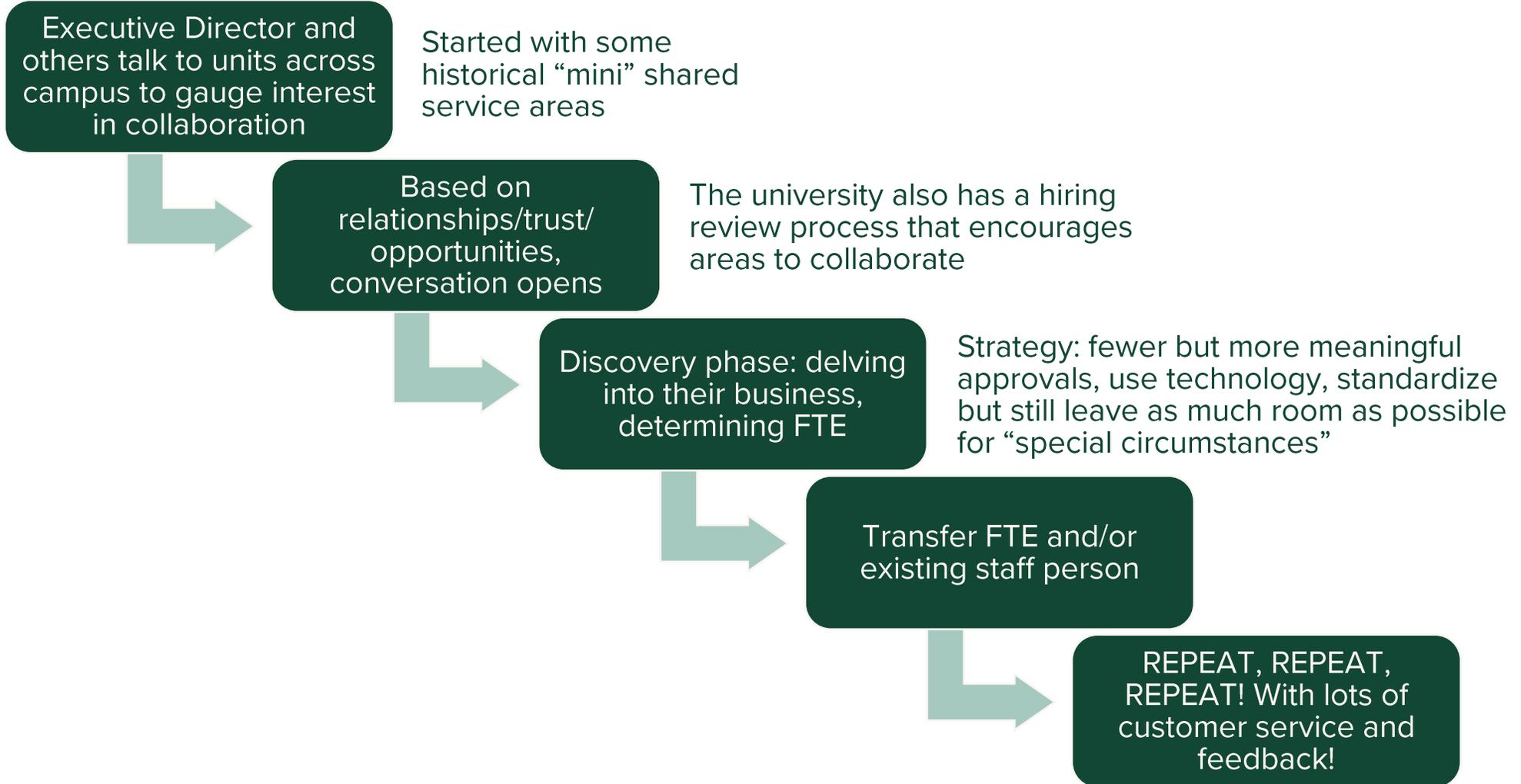


Only 4.5% turnover rate for staff accepting new employment outside BSC

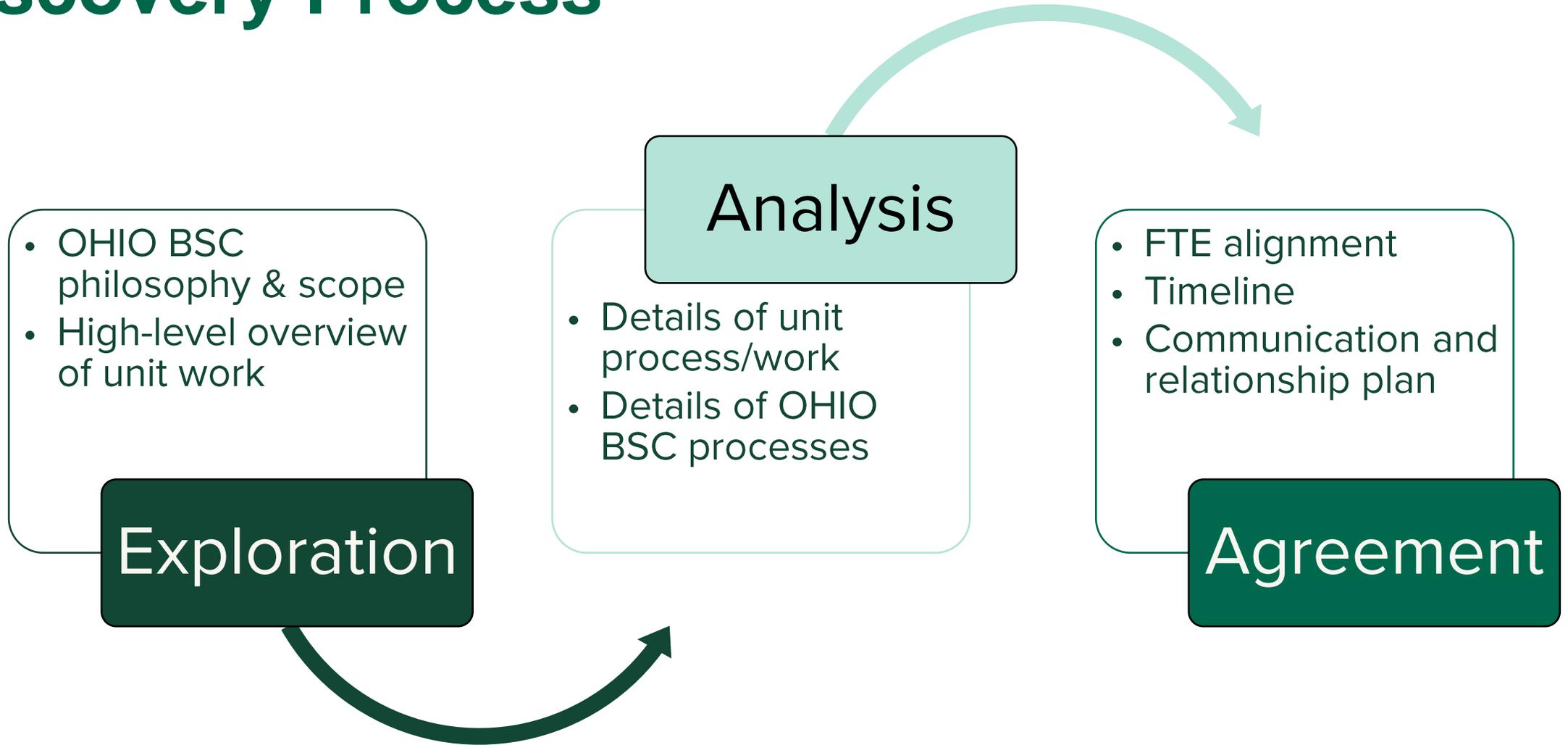
BSC employees have over **446** years of experience at OHIO

# **OHIO Business Service Center Discovery Process**

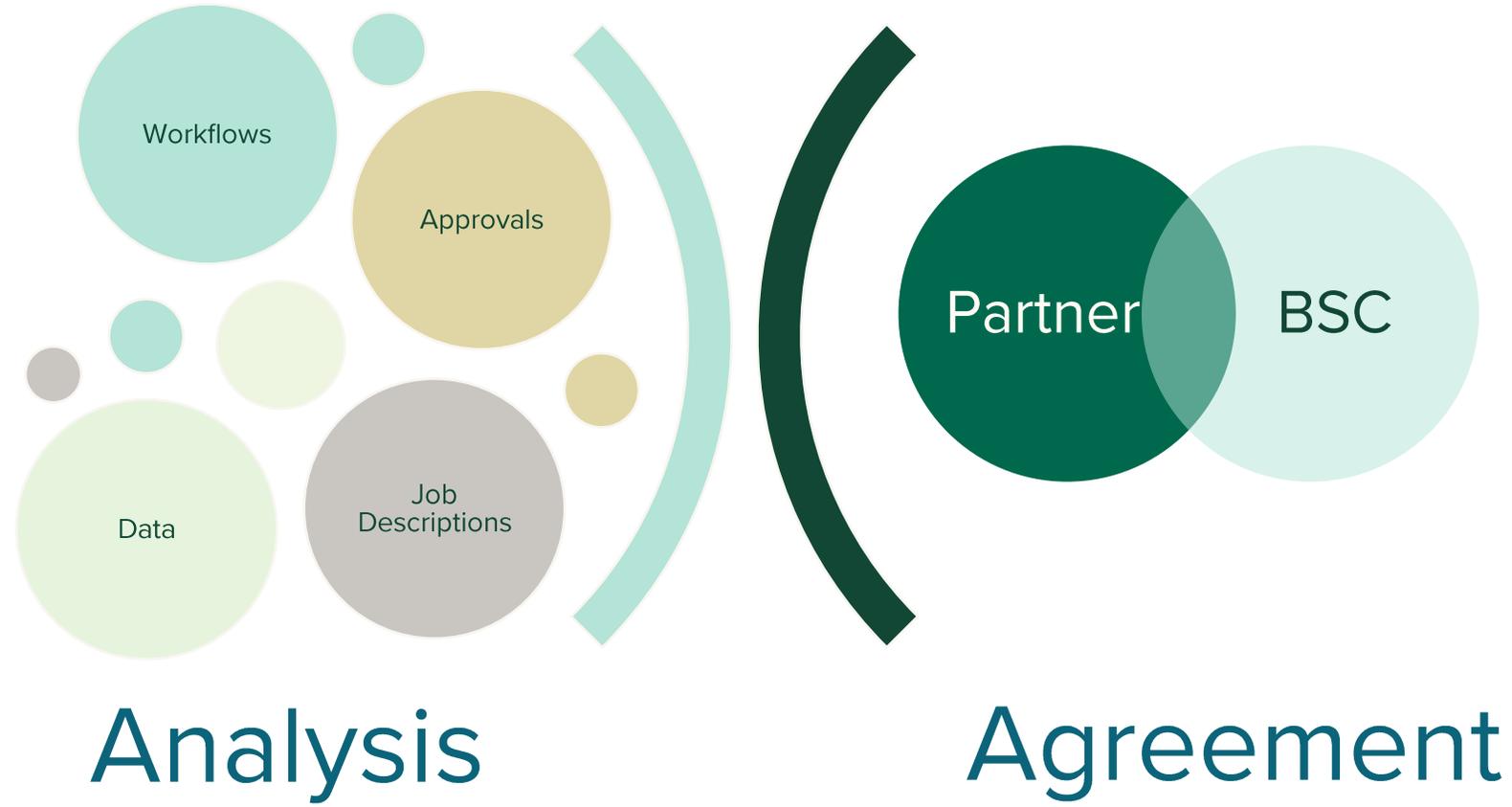
# How It Works



# Discovery Process



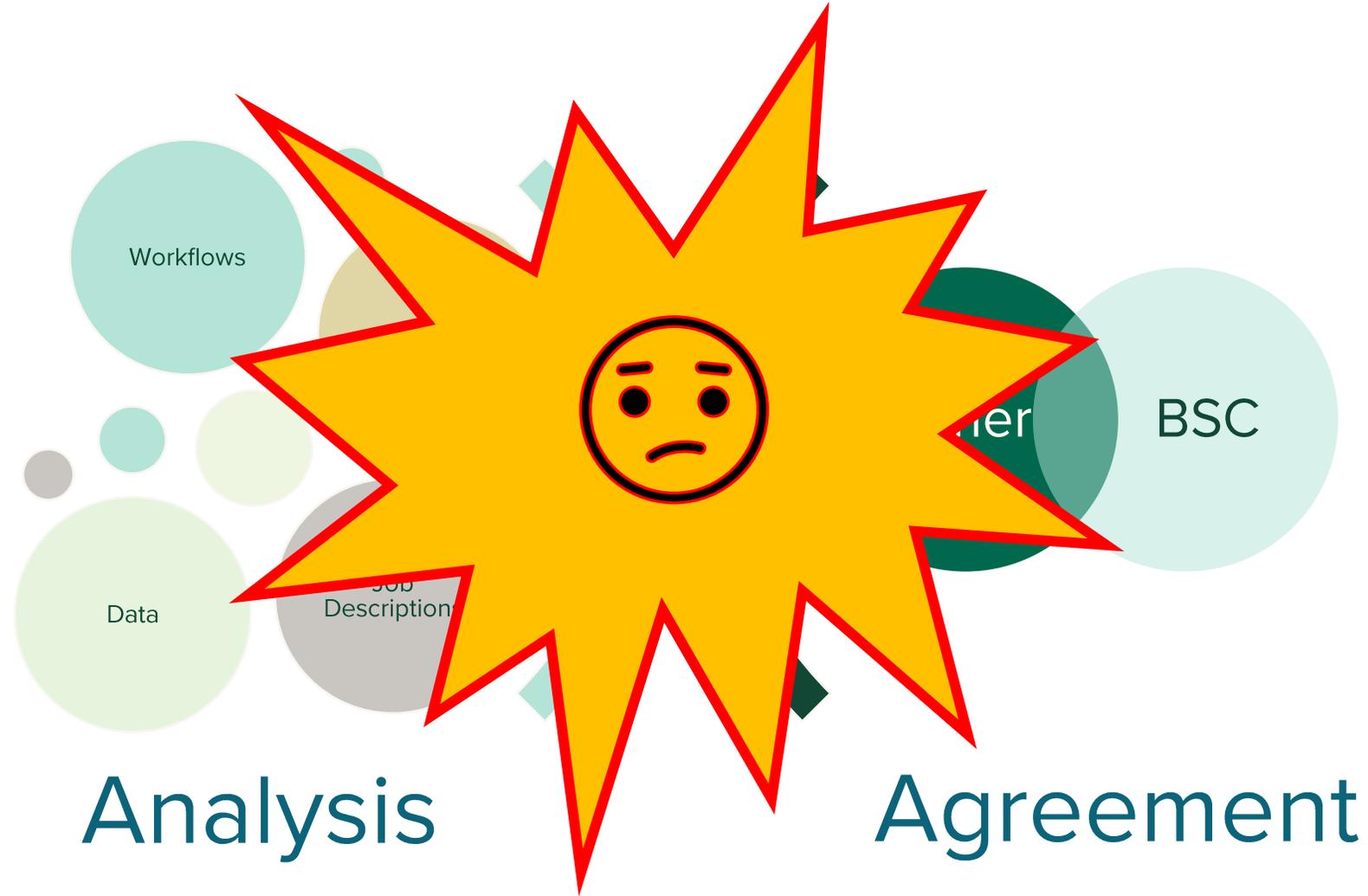
# Discovery Process



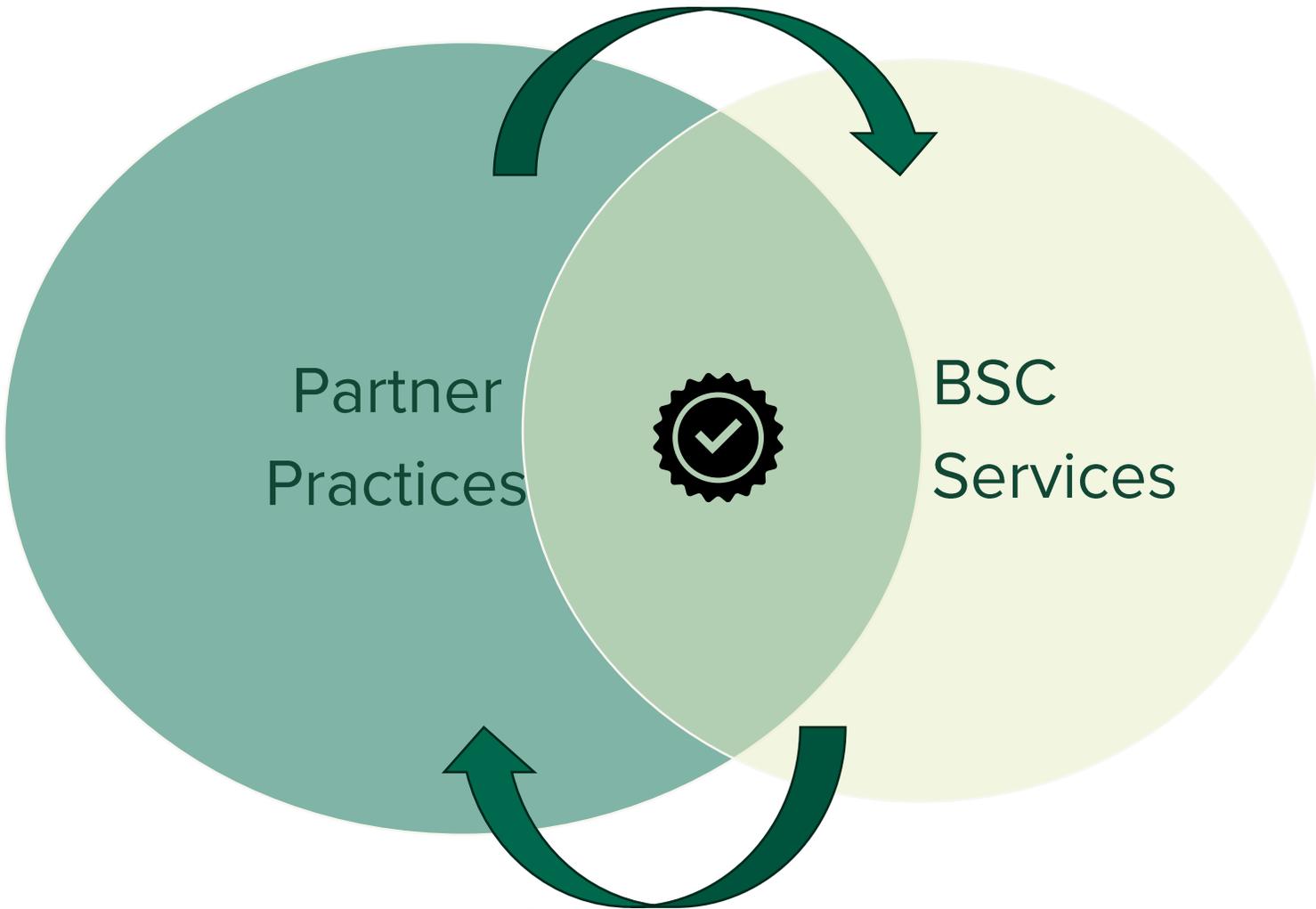
Analysis

Agreement

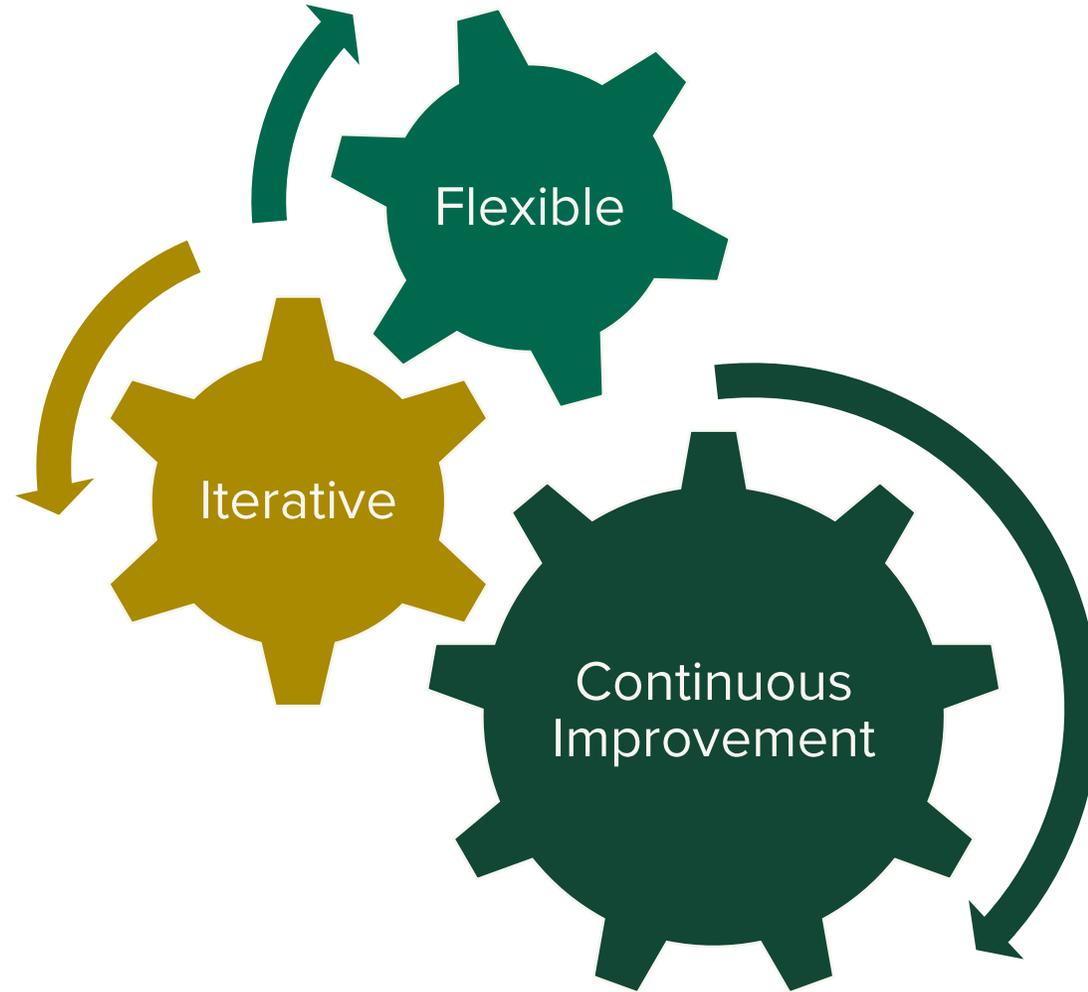
# Discovery Process: Challenges



# Discovery Process: Agreement



# Continuous Relationship Management



# **OHIO Business Service Center: A Unique Perspective**

# History of the OHIO BSC



# History of the OHIO BSC



# History of the OHIO BSC



# History of the OHIO BSC

OHIO  
BUSINESS  
SERVICE  
CENTER

# Integrating into Centralized BSC

- **Staff Transition**
- **Existing Staff Refocused**
  - Strong Accounting
  - Implemented New and Improved Processes (OHIO Online)
  - Efficiency Gains through Templates (OGO)
- **Change Leadership with Existing BSC Partners**
- **Next Step: Partnering for Strategic Financial Decisions**

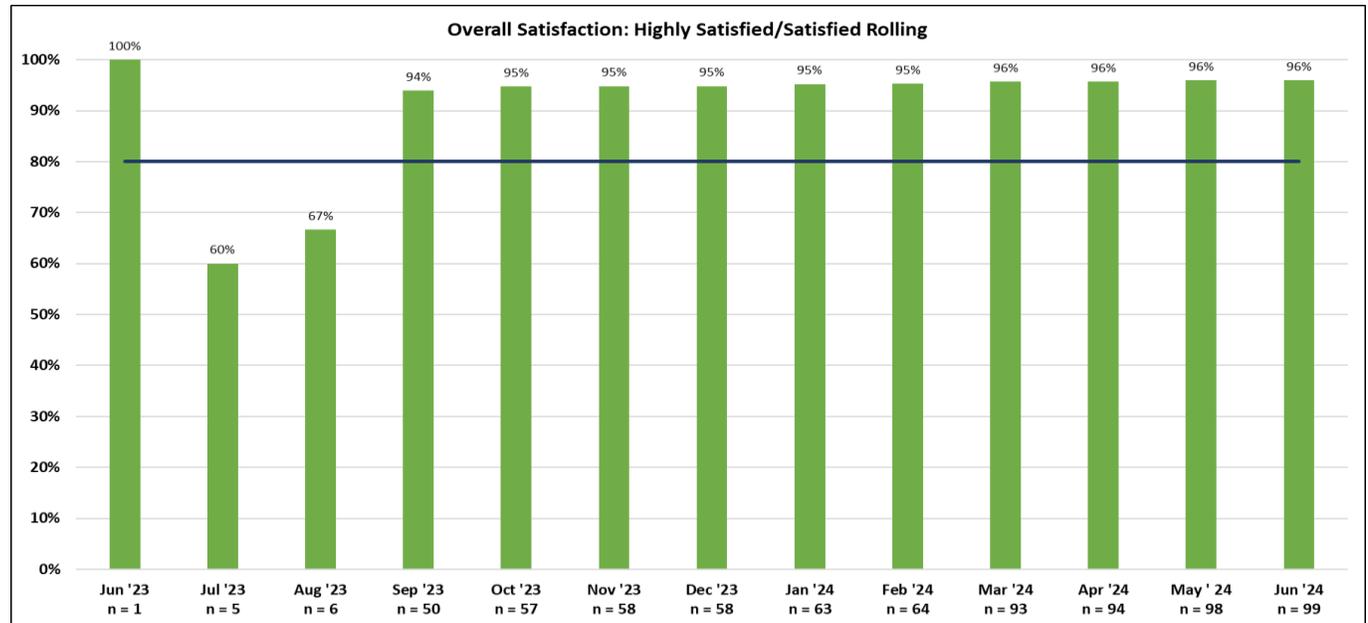
# **OHIO Business Service Center Process Improvement and Technology**

# Initial Process Improvement Prioritization

- Institution Leadership input
- Advisory Board input
- Institution-wide focus groups and survey
- Chief Finance and Administrative Officers input
- Executive Director mission and vision

# Voice of the Customer

- Technology benchmarking, with focus groups and piloting
- Departmental focus groups
- Research Faculty focus group
- Surveys
  - Overall BSC
  - Transactional



# Video Testimonial



# Technology and Automation

- Live Chat
- TeamDynamix ticketing system
  - Iterative improvements to forms
  - iPaaS solution for simplification and automation
- Approval workflow
- BSC App for custom account number selection

### Purchase Request

1. Requestor Information  2. Purchase Details  3. Accounts Info  4. Review 

#### Accounts Information

*Up to 10 account number(s) (cost center string(s)) may be entered.*

Account Number 

-- Please select from the dropdown --  

I want to manually enter in the account number(s)

I need help from the OHIO BSC staff to determine the cost center



Please visit  
**[ohio.edu/bsc](https://ohio.edu/bsc)**

to sign up for our listserv, view video  
testimonials, or seek additional information.

# Toolkit for Relational Business Services

## Concern: General

---

### Strategies & Considerations

- ✓ Talk to people and REALLY listen to understand.
  - ✓ Be genuine and empathetic.
  - ✓ Don't get ahead by throwing others under the bus – even when you are frustrated. 😊 You won't get ahead by not being a team player.
  - ✓ Be creative.
  - ✓ After talking with people, set your scope of work.
  - ✓ Think about what you really need to be successful and create a “wish list” org chart – be flexible enough that if it needs to change, it can.
- ✓ Taking what you know of the university and what you have heard (and not heard) from constituents, create an overall strategy using your institution's priorities and values. Use other models to spark your imagination; but no two institutions are alike, so don't treat them the same.
  - ✓ Treat others well – this seems so simple, but it's imperative!
  - ✓ Try to respect each unit's uniqueness and special needs while still standardizing where you get the biggest wins.
  - ✓ Try to look forward and find data, map processes, etc. Think about how you will show ROI.
  - ✓ Create KPIs.

# Toolkit for Relational Business Services

Concern: Decentralized units will be hesitant

---

## Strategies & Considerations

- ✓ Keep it in perspective – this can feel like scary change – it's ok if people are cautious. But be smart and don't necessarily start with the hardest units unless you KNOW you can deliver. An incremental approach may let you refine your offerings before moving to the harder units to convert.
  - ✓ Look for opportunities – who do you know and already have a good relationship with? Who trusts you and whom do you trust as well? Are there vacancies in a certain area that make a transition easier? Find situations where there is a win for the unit to participate and explore those first.
  - ✓ After you start to work with your first units, be in almost constant communication. Be personal, give out your cell phone, meet for coffee, etc.
- ✓ Look for opportunities to encourage joint ownership of the venture – if the decentralized unit has a great template USE IT. Ask for their feedback. They will be your biggest champions if you do what you say, care about what they care about (STUDENTS!) and show their staff respect. Praise in public, criticize in private.
  - ✓ Have an elevator speech prepared and use it often!
  - ✓ Be creative. Give them something they didn't have before (transparency, live chat, travel specialists, student reimbursement specialists, sounding board for grant budgeting, etc.).

# Toolkit for Relational Business Services

## Concern: Centralized units may be resistant

---

### Strategies & Considerations

- ✓ Think about that elevator speech you prepared for the decentralized units. Now think about it from a centralized perspective. Do you need to add or tweak something (e.g., faculty may not respond to the word “efficiency” so for decentralized areas you may want to say “we want to get your student’s reimbursements faster” or “purchasing” but words like “efficiency”, “ROI”, and “procurement” are more easily understood in centralized units)?
- ✓ Understand that many centralized units are incredibly understaffed and be sensitive that the work you want done may (at least in the short term) create additional stress for them. Talk to centralized units about their pain points and creatively approach ideas to minimize their work. Partner to solve some of their inefficiencies early on if possible.
- ✓ Don’t forget that genuine gratitude goes a long way. Many of these folks are behind the scenes, so make sure you share the successes of the service center as part of their successes as well. You cannot do this without good centralized partners!
- ✓ Understand change is hard for everyone and change management requires lots of different approaches at different times.

# Toolkit for Relational Business Services

## Concern: Leadership

---

### Strategies & Considerations

- ✓ Know your audience – what does leadership care about and how can what you do help deliver that? Examples include efficiencies, faculty and student satisfaction, responsible spending, compliance, cutting edge, research facilitation, employment experience, retention of employees, staff morale, better forecasting, etc.
  - ✓ Create a business plan – include scope, structure, budget, anticipated gains. This is incredibly important, so spend time on it!
  - ✓ Articulate KPIs.
  - ✓ Set realistic goals.
  - ✓ Make it personal – find influential champions and use them.
- ✓ Think about an advisory board. If you go this path, make sure you have an agreed upon scope.
  - ✓ Communicate.
  - ✓ Share wins publicly – employee news, speaking engagements, campus opportunities.
  - ✓ Think realistically about what you can achieve. OHIO's strategy was to focus on satisfaction and efficiencies, but to be able to do more for the customer. We tried not to promise "cuts" because that undercuts what we are doing with our constituents; but the reality is if we get more efficient, we can bring on more units and/or offer more services without additional costs, which means the university can potentially reduce elsewhere.

# Toolkit for Relational Business Services

## Concern: Staffing Constraints\*

### Strategies & Considerations

- ✓ Think about training modules you need. Do you need refresher courses on how to deliver the basic services needed? What does your university already offer that you may be able to take advantage of? Once you identify needs, explore opportunities.
- **Recommendation: OHIO BSC completed a 12-week training on radical customer service as outlined in the book “The Service Culture Handbook” by Jeff Toister. Additional resources were available online, and content was initially delivered by BSC leadership but quickly moved to employee empowerment and presentations. This was a voluntary, in-person professional development opportunity that over 75% of staff took advantage of. Those who did not make the time commitment were still exposed to themes through staff meetings and other communications.**
- ✓ Make staff feel comfortable. This is a scary time for staff who may be moved into your area. You need them to be excited to join you, not an obstructionist. Don't underestimate the power of unhappy staff. So, work on this...spend time with staff, reinforce that we are learning together, praise accomplishments, create team feeling, think about a mentoring program, etc.
- ✓ Ask your staff and listen! These are some of the biggest experts you have access to.
- ✓ Create employee recognition program – leadership-to-staff AND peer-to-peer. This is incredibly powerful!
- ✓ You still need this elevator speech for staff! They need to feel that they are a part of things and to be excited they have an opportunity to positively impact the university.

\* Staff may not have the knowledge or be able to do this level of work, or they may not be happy that they now will do this work 100% of their time.

# Toolkit for Relational Business Services

## Concern: Financial Constraints

---

### Strategies & Considerations

- ✓ Financial challenges are real!!!
  - ✓ Focus on service and efficiencies.
  - ✓ Protect your staff but also push them to do more – look for staff efficiencies (like templated emails) that seem small but can have major impact.
  - ✓ Be up front with leadership on initial financial commitment. Different financial constraints may impact how you implement business services, so be realistic and articulate the pros/cons of the method you would like to pursue.
- Because OHIO is incredibly decentralized, to be able to move staff into the center, we did not have the luxury of only taking one service area at a time. Therefore, we took budget, financial operations, purchasing/travel/reimbursements and employment services simultaneously, but that only worked because leadership provided some initial seed money to allow us to ‘top off’ partial FTEs and provide some flexibility in how staff were moved into the center.

# **SIGN out**

**Use the app to sign-out if you signed in for CPE**



**CACUBO**

Central Association of College  
& University Business Officers