


SHARED SERVICES TEAM

Document Name: Strategic Plan for Shared Services Template

Usage Guidance

Toolkit materials should only be used with due consideration to the context and requirements of the programme in question. Materials should not be directly applied 'off the shelf.'

CATEGORY DESCRIPTION

<p><i>1. Example material</i> –The tool has been provided by a single public or private sector organisation, or an external forum that has not been moderated by the Shared Services Team. It represents one possible approach to a given shared service activity, and can be used by Toolkit users as an example / reference aid.</p>	
<p><i>2. Co-developed material</i> – The tool has been produced through the collaboration of the Shared Services Team and one or more public sector organisations and / or private sector organisations. This tool Provides a jointly developed approach to a given shared services activity, and can be used by Toolkit users as an example / reference aid.</p>	
<p><i>3. Output Templates</i> – These set out what is typically included in an output of this name. They have been created as part of the development of the toolkit based on experience and best practice from other programmes and project methodologies. However, your organisation may already have a set format and template for you to use.</p>	

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Strategic Plan for Shared Services Template

The purpose of this document is to set out the vision and business plan for a shared services organisation.

For providers this will be an important element in the marketing of their services to new and prospective customers.

Typically it would be a 3 year plan and set out the current status and plans for development. This would include plans for customer take on and service development for both existing and new customers, e.g. IT upgrades, key process changes and targets for performance improvement.

It is aimed at meeting the needs of several target groups:

- Customers: outlining details current performance levels and capability for existing and potential customers. It also identifies new areas that the shared service provider is targeting to achieve.
- Staff: outlining investment plans for staff development and new service opportunities.
- Management: the business plan is the key reference document for the Governance Board to measure performance against a standard.
- Investors: identifies performance against current targets and key growth strategies and plans in place for their delivery.

If your organisation has yet to decide whether to deliver its Corporate Services through a shared services model, during this phase you would document your future vision for delivery. You may want to adapt this template to document this. However, organisations often describe their vision in a simple statement or diagram. The next stage would be to identify and assess the options that can deliver this vision. This would lead to the production of the initial business case.

Background and Business Drivers

Background to the establishment of the shared services organisation, customer take on to date and other decisions and events (internal and external) that influence the strategy and plan. You may also include what benefits have you achieved to date from setting up your shared services organisation and future targets for improved efficiency and performance.

Shared Services Vision and Strategy

What is the future vision for the shared services organisation? E.g. do you intend to become a leading shared services provider across the UK public sector; do you intend to provide shared services in line with best practice benchmarks to only your Department's family. What would the shared services organisation look like in 5/10 years time?

Outline of current shared service offering

Typically this would include:

- Scope of services delivered;
- Operating Model, including a high level description of the expected role of the retained function;
- High level description of the service management framework including key performance indicators;
- Current customer base;
- Governance Processes;
- Current staffing capacity and capabilities – including organisational culture;
- Management team profiles;
- Benefits sharing scheme – details of how this works for current customers.

Customer Take on Strategy

The plan will include a list of targeted markets and customer types. It would include the process to be followed with prospective customers and targets for take on of new customers and migration periods.

Service Expansion Plan

This would set out any plans for expanding the scope of the shared service offering, e.g. provision of advisory services, facilities management.

Service Development Strategy and Plan

Typically this should include;

- Current scope of services and approach to continuous improvement for current services, e.g. Lean, Six Sigma;
- Identification of new service offering capability;
- Technology capability to support the new service delivery;
- Expected benefits from new service areas and key target markets;
- Identification of any change of location of services e.g. moving to an outsourced model;
- Any key partnerships required to deliver these new approaches.

People Management Strategy and Plan

Typically this would include approaches to:

- Retaining and developing current resources and skills, including staff training plans;
- Attracting the right people to support the growing new business;
- Knowledge Management strategies.

Customer Service Plan

This would set out how excellent customer service would be provided. It would include methods for gaining customer insight and gauging customer satisfaction, e.g. customer forums and survey and plans for how the findings will be acted upon, e.g. links to staff training plans.

Technology Upgrade Strategy and Plans

Set out the planned path for IT patches and upgrades. Include upgrades in software as well as business events that affect IT, e.g. annual pay award; end of tax year upgrades.

Financial Management Strategy and Plan

Typically this would include:

- Details of how the investment funding required for growth in services and customer areas will be funded;
- The charging model including what happens when volumes differ from assumptions;
- Actions to be taken with regard to surpluses and deficits. Whilst the plan should be to break even, there needs to be a mechanism to deal with the administration of these (e.g. Gain Share Agreements) should they arise;
- Shared Service headcount capacity planning to achieve growth targets
- Technology Investment strategy as required for support of growth targets;
- Infrastructure strategy and investment – identification of any new infrastructure (sites/ offices etc) investments to deliver projected growth targets;
- Details of expected productivity and efficiency gains and how they will be delivered.

Assumptions and Risks

Set out key assumptions and risks and the approach to risk management.