



# Annual Shared Services GBS & BPO Conference

19-20 November 2014  
**Edinburgh**



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# Deloitte.

**Focus:**

Get the customer  
balance right

*Stuart Clark*

*Eaton*



# Eaton **NOT** Eton



# Powering businesses worldwide for more than 100 years



- Founded in 1911 by J.O. Eaton
- Power Management company
- Headquarters: Dublin, Ireland
- Key locations in Cleveland, Ohio; Shanghai, China; Morges, Switzerland; Sao Paulo, Brazil
- Innovation Centres in regions **around the world**
- Customers in more than **175 countries**
- 2013 sales of \$22 billion
- More than **100,000 employees**

# Eaton's businesses



Electrical Sector  
2013 Sales \$13.5 B

Electrical Products

Electrical Systems & Services

Industrial Sector  
2013 Sales \$8.6 B

Hydraulics

Aerospace

Vehicle

# The Eaton power management advantage



- Providing energy-efficient solutions for more sustainable buildings, communities and infrastructure
- Accelerating the development of renewable energy technologies
- Powering mobile and stationary equipment more productively and safely, while reducing their environmental impact
- Advancing safety and security in harsh and hazardous environments
- Designing eco-efficient aircraft that reduce fuel consumption and operating costs
- Improving fuel economy and reducing emissions in autos and trucks

### Background

- Based in Glasgow
- Shared service centre opened in 1997
- Employees over 70 finance staff

### Who We service

- 4 Divisions
- Over 100 Operations
- Governance of the International Instance

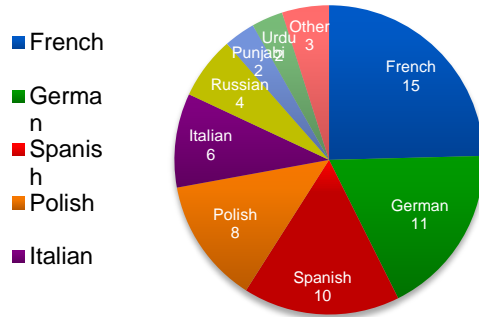


### What are our services

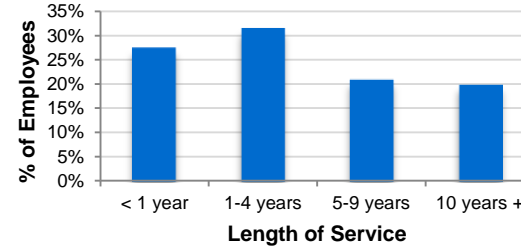
- Transactional Oversight
- Corporate Accounting
- Working Capital
- Finance Integrations
- Business Partnering
- Cash flow enhancement
- Business Improvement
- Document Management

# Demographics

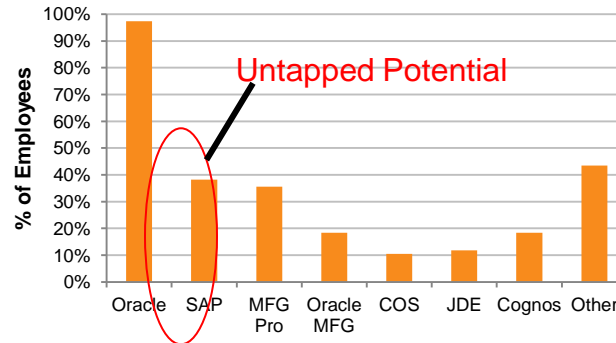
## Languages



## Length of Service



## ERP Experience





# Transactional to Value Add Services

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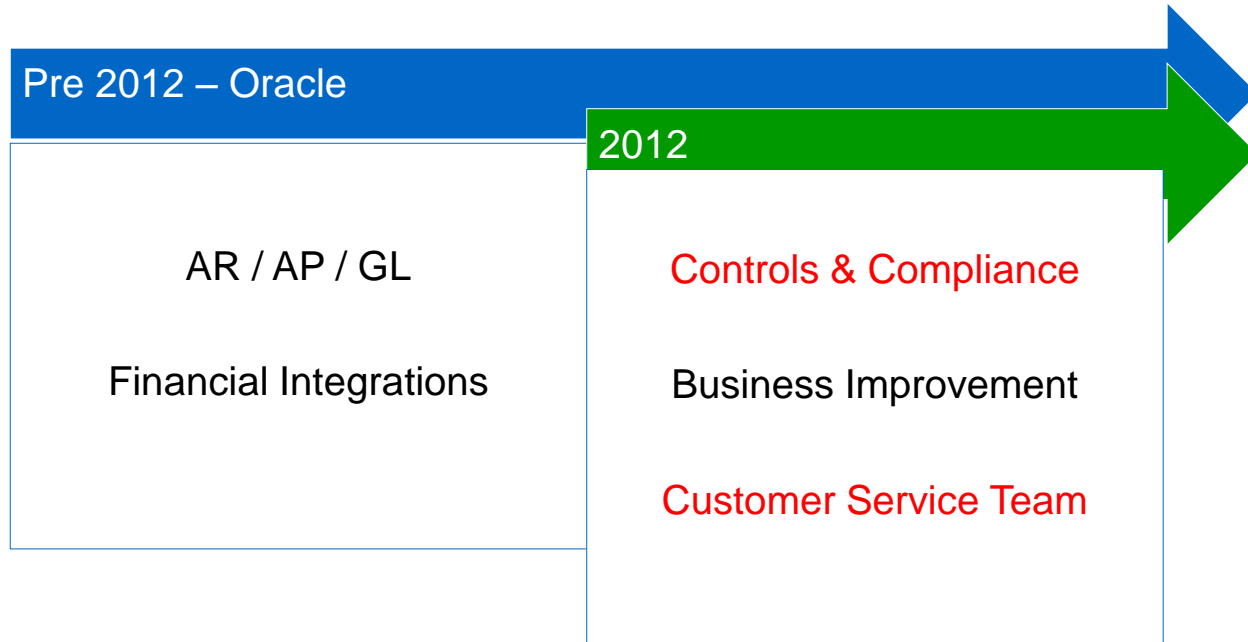


Pre 2012 – Oracle

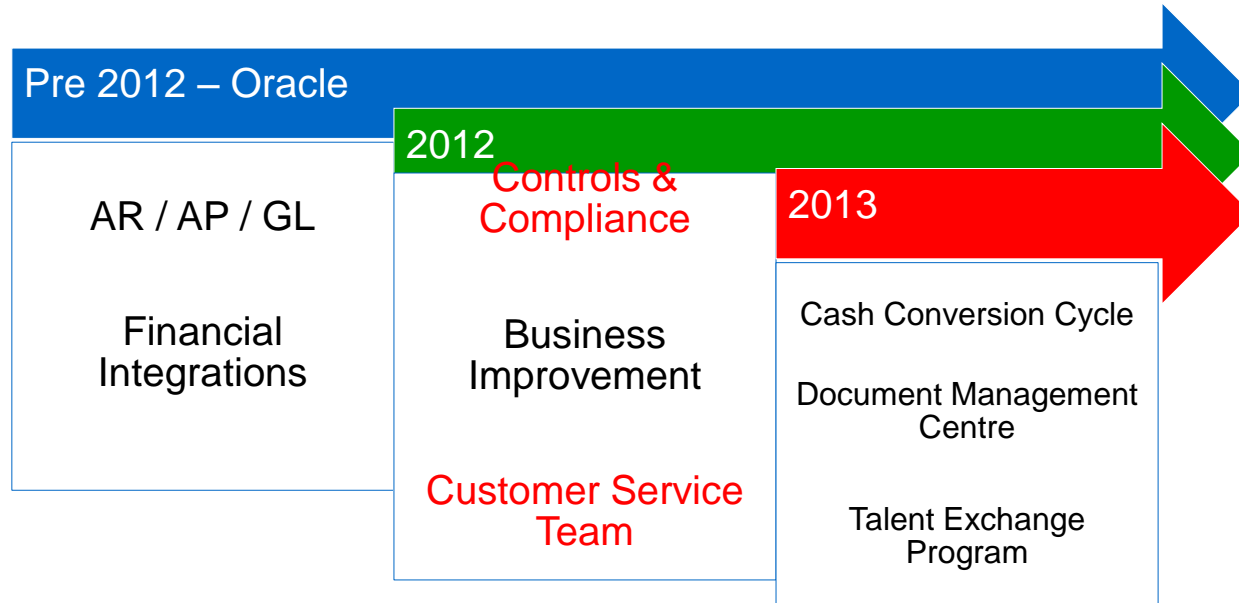
AR / AP / GL

Financial Integrations

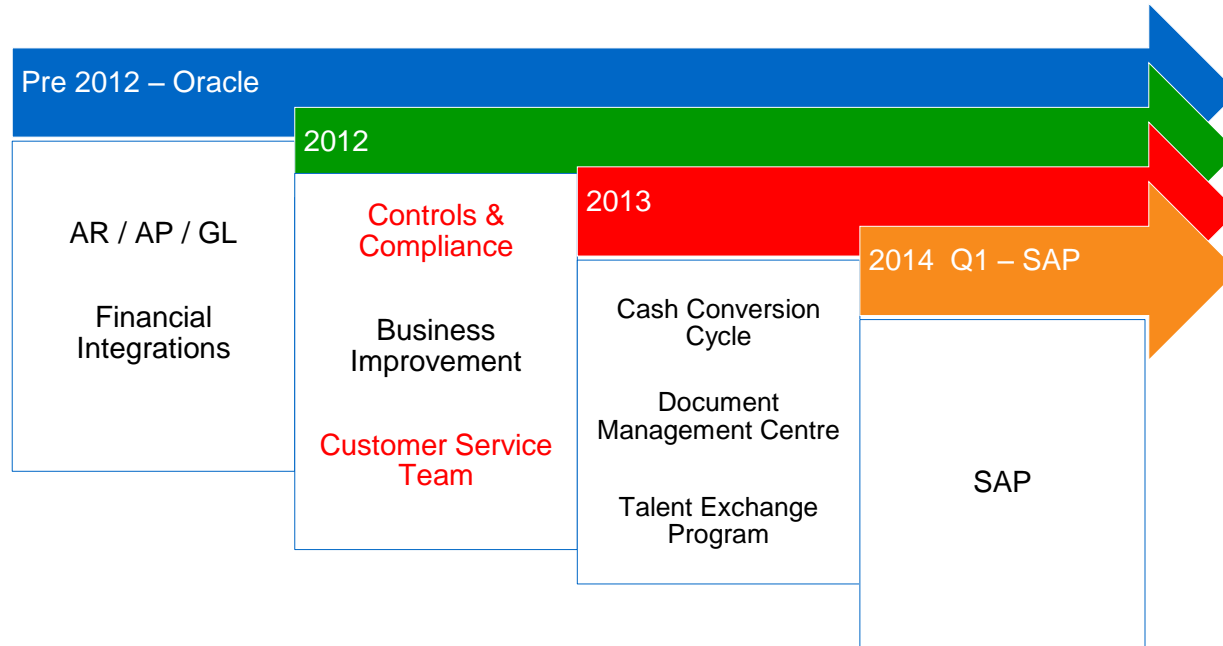
# Transactional to Value Add Services



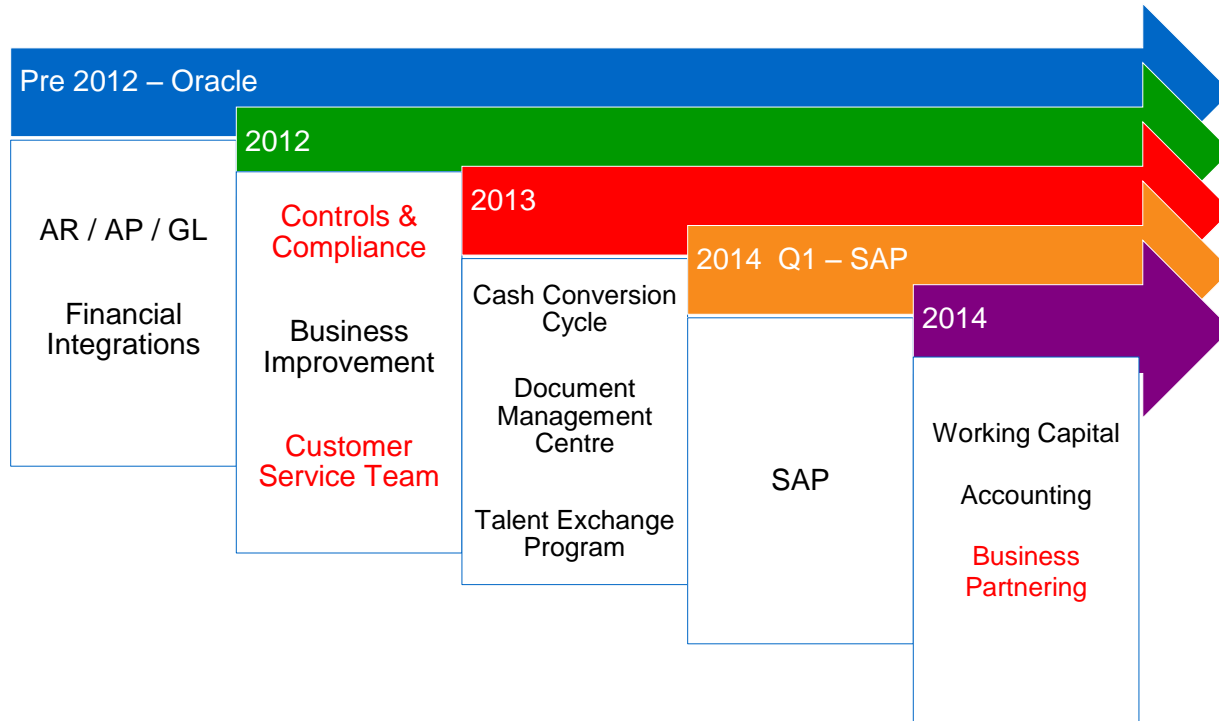
# Transactional to Value Add Services



# Transactional to Value Add Services



# Transactional to Value Add Services





- How many of you have a Customer Team or Business Partner Arrangements?
- Do you see Business Partnering as a strategic asset or to pacify the customer base?

# Why did we create a Customer Team ?

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- Customer Survey results were poor
- Level of noise reaching the VP Finance EMEA
- It was constraining our ability to grow as a centre
- Customers wanted more than just a standard service
- We were measuring the wrong metrics
  - look beyond cycle time and efficiency metrics

# What did the Customer Team look like?

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- Created a separate function with a supervisor
- Centralised mailboxes & telephone contacts into this team
- Dedicated 8 personnel by moving them from the process teams into this centralised team
- Part of a Customer Relationship Management Framework
- Customer visits and interaction to listen to the voice of the customer



# Was the customer team a success?

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No

Why do you think it failed?

# Why did it fail?

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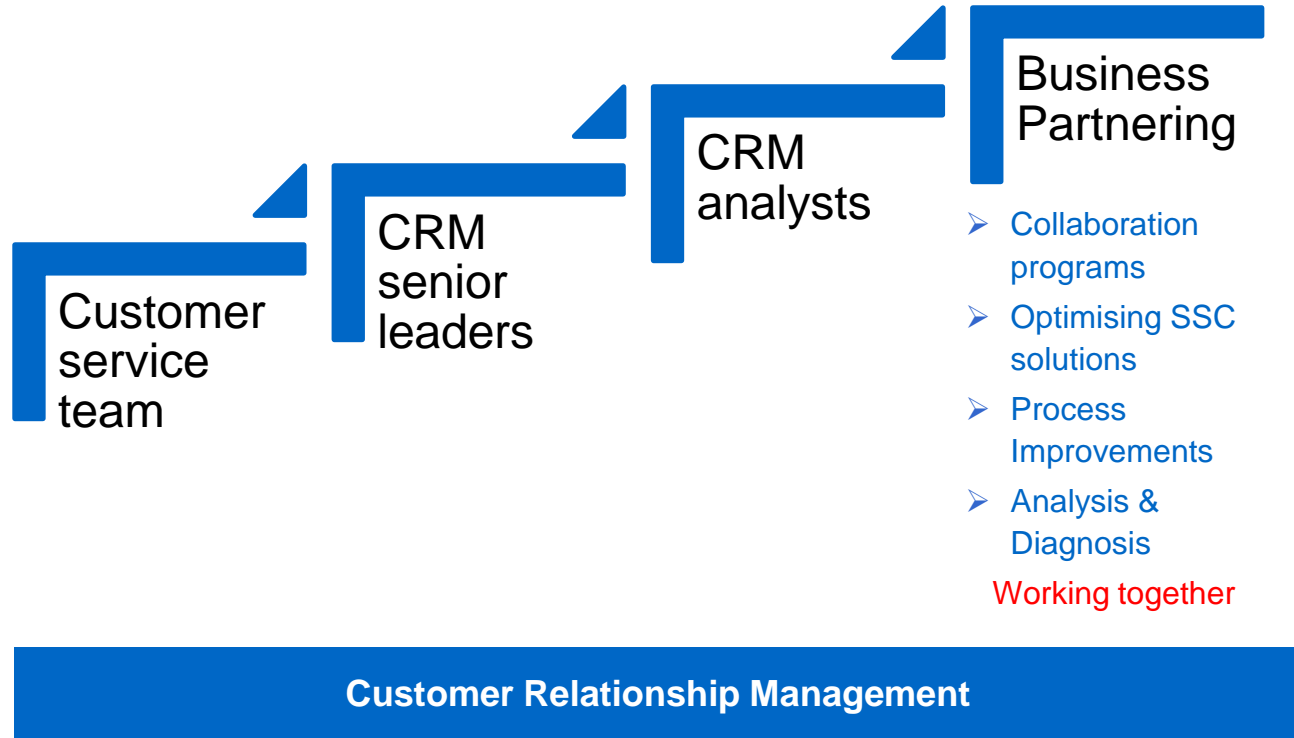
- Not all of the team had a passion for customer service
- The team was not multi-functional
- It could not handle all the requests that came through the mailboxes
- Collaboration work was being done by separate project teams
- The team required to liaise with the process teams & acted like a “middle man”
- It was too tactical and not strategic
- Hired some professional customer service personnel but they lacked the Eaton process knowledge
- Lacked gravitas

# Why did it fail?

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- Under-estimated the volume of e-mails that came through the mailbox
- Lack of diagnostic and root cause analysis skills - reactive rather than proactive
- People within the SSC saw the customer team as team who took care of customer service
- The customer base was not ready for a “standardised process” and wanted a personalised service & circumvented the customer team

# Customer Service Evolution



# What did we do?

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- Disbanded the customer team & had a period of reflection
- Created a separate Business Partnering function reporting to a senior manager
- Developed the relationship at a more senior level in the organisation
- More experienced & skilled personnel to support & partner
  - Relationship builder
  - Language capability
  - Controls & Compliance
  - Migration / project expertise

# What did we do?

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- More strategic in direction and less tactical
  - Not just about servicing issues & complaints
  - Building relationships & confidence in the SSC
  - End to end process improvements
- Each CRM Analyst partners with a SSC Senior Manager to engage each division

# What did we do?

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- Skilled in project execution, migrating activities & the delivery of technical solutions
- Key goal of listening to the “voice of the customer” and optimising the level of SSC services
- Partnered with the Vehicle Division and proved that all transactional activities could be done from the SSC
  - Collections Centralised
  - Customer set up centralised
  - Customer Self-billing
  - Automated Cash application (MT940) and auto-inbox
  - Pricing
  - Sales Invoicing
  - Supplier Self-billing
  - Cash Conversion Cycle

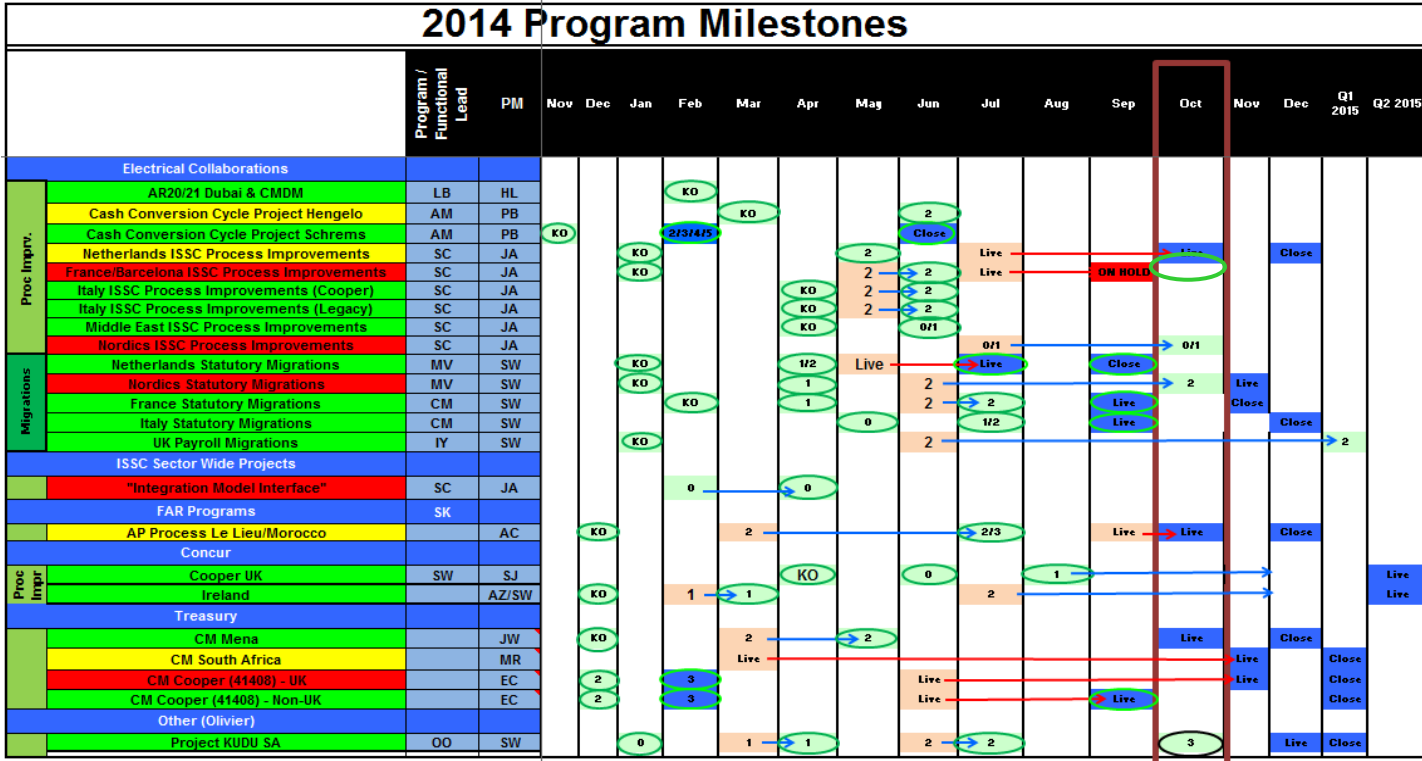
# What did we do?

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- Replicated success of partnering with the Vehicle division to other divisions
- The electrical division was the prize
- Centre Director engaged with Electrical division senior leadership
- Active collaboration programs across all 4 divisions
  - Governance framework
  - Regular planning & review sessions



# 2014 Electrical/Corporate Collaborations Key Milestones



# What did we do?

- Robust Customer Contact System



Glasgow Financial Service teams can be contacted: available via phone, email or through the our newest channel, the Finance Service Catalogue.

## Finance Service Catalogue

The introduction of the Finance Catalogue has been driven by the need to enhance the customer service experience and strengthen the controls over management of day-to-day financial requests.

The Finance Catalogue allows full visibility on the status of all customers logged requests. The added controls enable full reporting and root cause analysis on all requests, issues and escalations.

# Finance Service Catalogue

Streamlining our customer communication channels



Access the Finance Service Catalogue via EMEA Intranet



Log your request to generate a service ticket



Automatic routing of your request to the correct Financial Services team



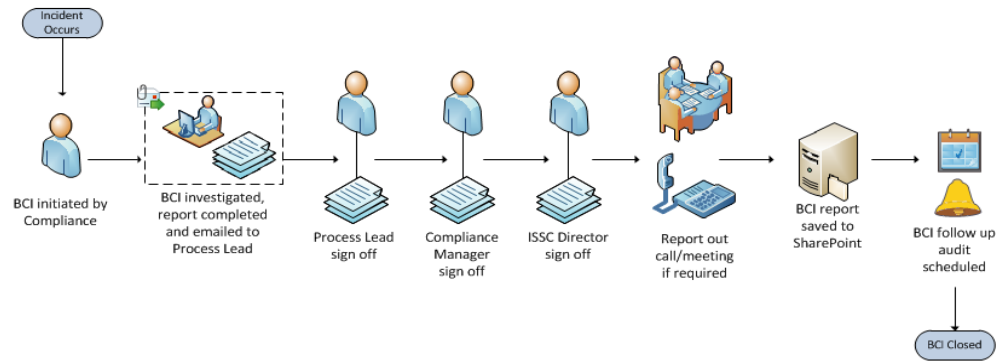
Automatic notification sent to you once request is completed



Log escalations via CRM option, your divisional CRM will action with the required team

# Controls & Compliance Activity

- Controls & Compliance Function
- Business control incidents



- Operational control collaborations
- Operational investigations
- SOX Compliance

# What have we achieved?

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- SSC now has credibility with the senior leadership in EMEA
- Electrical division now want to work with us and have started to migrate SAP activities
- The ISSC is seen as a solution to help streamline the business and to take cost out
- Helping to transform finance in the EMEA region

# Q&A

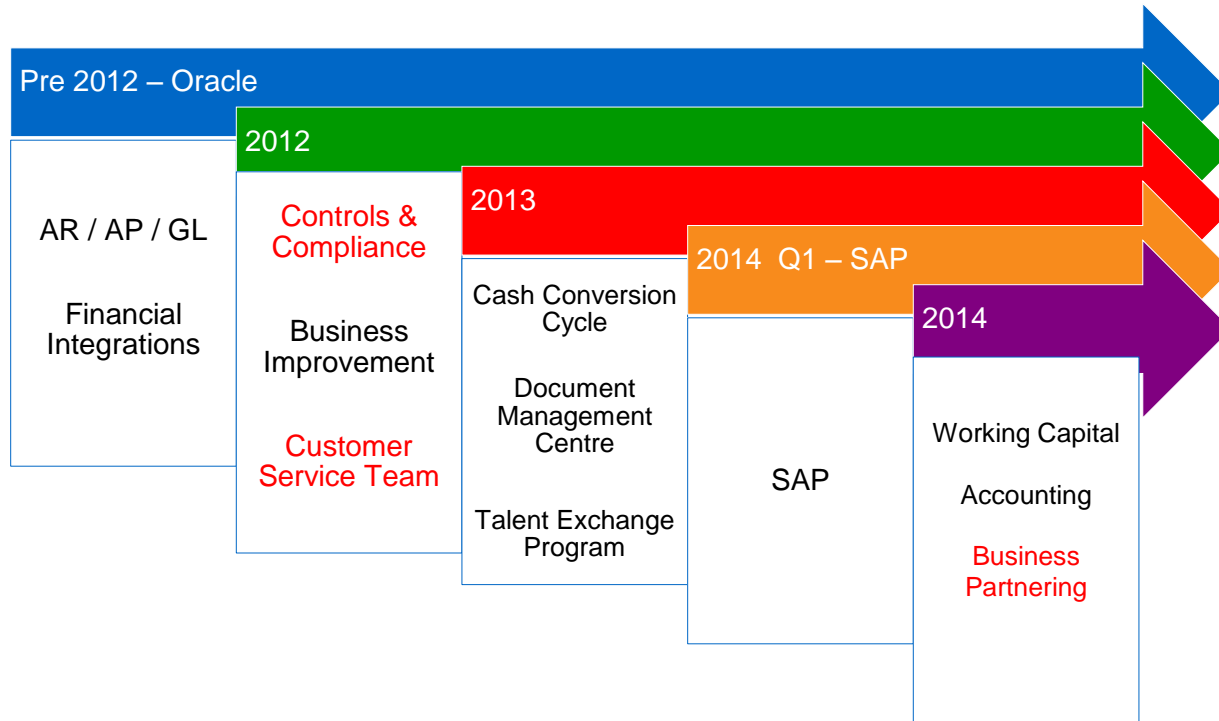
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*Powering Business Worldwide*

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