CONCEPT

# Shared Services and Centre of Excellence (CoE) Design and Governance

29 March – 2 April 2027
Barcelona - Eixample district four-star



# Shared Services and Centre of Excellence (CoE) Design and Governance

**Ref:** 1105_5408 **Date:** 29 March – 2 April 2027 **Location:** Barcelona - Eixample district four-star **Fees:** 23500 SAR

**Technical depth:** Conceptual · **Practical mode:** Case study

## Introduction

Organisations consolidate finance, HR, procurement and IT support into shared services and centres of excellence to cut cost and raise standards, yet many centres simply relocate old inefficiencies. Business units lose trust, retained teams duplicate the work and charging disputes consume leadership time. This Core Concept course equips executives to decide what to share, how to design and govern it, and how to judge whether it is working. Using cases from several sectors, participants leave with a Shared Services and Centre of Excellence Design Case for their own organisation.

## Course Objectives

- Assess which activities in an organisation are suited to shared services, a centre of excellence or retention in the business
- Compare shared services, centre of excellence and global business services models and the standards that guide them
- Define the retained organisation, service agreements, governance forums and charging model for a shared centre
- Judge location, sourcing and automation options against cost, capability and risk criteria
- Oversee transition risk and the performance measures that show whether a centre delivers value
- Present a Shared Services and Centre of Excellence Design Case for executive decision

## Target Audience

- Executives accountable for the cost and quality of support functions across a group or agency
- Senior finance, HR, procurement and IT leaders considering consolidation of their function
- Senior leaders who sponsor or govern existing shared service or global business services centres
- Senior transformation leaders evaluating centralisation, outsourcing and centre of excellence options
- Board and executive committee members approving major consolidation programmes

# Course Outline

## Day 1: Shared Services Landscape and Opportunity

- Shared Services, Centres of Excellence and Global Business Services Compared
- Value Drivers: Scale, Standardisation, Expertise and Control
- Activity Scope Screening Using the APQC Process Classification Framework
- Current-State Cost and Effort Baseline Review by Process
- Consolidation Opportunity and Readiness Assessment Matrix

## Day 2: Delivery Models and Guiding Standards

- Delivery Model Options: Centralised, Hub-and-Spoke and Virtual Centres
- Centre of Excellence Operating Roles: Advisory, Governing and Delivery
- Service Management Requirements Under ISO/IEC 20000-1
- Outsourcing Decision and Governance Guidance in ISO 37500
- Maturity Path from Transactional Shared Services to Integrated Global Business Services

## Day 3: Designing Scope, Governance and Charging

- Retained Organisation and Business Partner Role Design
- Internal Service Agreement Framework and Customer Council Design
- Charging Models: Allocation, Activity-Based Charging and Fixed Price per Transaction
- Shared Centre Governance Board Under ISO 37000 Accountability Principles
- Location Attractiveness Scoring: Cost, Talent, Risk and Time Zone

## Day 4: Risk, Performance and Optimisation

- Transition Risks: Knowledge Loss, Service Dip and Stakeholder Resistance
- Shared Services Risk Oversight Aligned to ISO 31000
- Performance Benchmarking with Cost per Transaction and Process Maturity Indicators
- Centre of Excellence Value Measurement and Demand Management
- Global Process Ownership and Automation Opportunities with Robotic Process Automation

## Day 5: Case Work and the Design Case

- Multi-Entity Finance Consolidation Case Study
- Analytics Centre of Excellence Case Study: Diagnosing Low Business Adoption
- Scope and Location Scorecard for the Participant's Organisation
- Shared Services and Centre of Excellence Design Case Drafting
- Executive Panel Challenge and Design Case Defence

## Skills You Will Gain

- Consolidation Opportunity Assessment
- Delivery Model Selection
- Retained Organisation Design
- Internal Charging Governance
- Location Strategy Evaluation
- Shared Services Performance Oversight
- Transition Risk Judgement

## Why Attend This Course

- Return to work with a Shared Services and Centre of Excellence Design Case for your organisation, tested before an executive panel
- Recognise the design choices that turn a shared centre into relocated inefficiency, before they are made
- Resolve charging and service disputes between centres and business units with clear governance rules
- Compare consolidation experience with senior leaders from other sectors and countries

## Conclusion

Shared services and centres of excellence create value only when the scope, retained organisation, governance and charging model are designed together and judged on evidence. This course moves from screening activities and comparing delivery models, through the standards that guide service management and outsourcing, to the risks and performance measures that show whether a centre is working. The final day turns that judgement into a Shared Services and Centre of Excellence Design Case that participants take back for executive decision.