

# Transcend the Transactional with EquaTerra’s On-site Brand Workshop

What is your shared services brand? Is it working for you or against you as you attempt to move your services up the value chain? Some shared services organizations (SSOs) find themselves in the “transactional trap”...mired in high-volume transaction work that is of little relevance when performed flawlessly and is hotly criticized when it is not. As one SSO leader caught in the trap put it, “Selling every new idea and service to each customer is a slog; what we need is an environment where innovation isn’t just expected of us, it’s required.” Undeniably, a great aspiration...but how do you break free and create a culture where clients are demanding better and more service?

For many SSOs the answer to this question starts with building brand equity. Every SSO strives to continuously improve the quality and value of the services they provide. Whether you’ve explicitly tied these two objectives to a “branding” concept, service quality and value are integral to the image your customers perceive about shared services. But what if you did make that explicit connection? What incremental positioning might you expect in your internal marketplace if you successfully elevated your reputation for quality and value? As importantly, what are the other dimensions of your image and what lift might you achieve by enhancing those? As illustrated in Figure 1 below, EquaTerra believes there are six discrete dimensions to an SSO brand:

Brand Dimensions	What image comes to mind when customers think about your shared services organization?
People	Knowledge, experience, dedication and helpfulness of your team
Leadership	Business acumen, insight and integrity of your leadership
Quality	Consistency, timeliness, reliability and accuracy of your services
Value	Cost, price transparency and value of your services
Relevance	Relevance and business impact of your service offering
Innovation	Creativity, innovation and transformational results you deliver

Figure 1

## The Basics

- What:** Shared Services Brand Workshop
- Audience:** Shared services center leader and his/her direct reports
- Where:** At your site
- Length:** One day
- Facilitator:** 15+ years experience guiding shared service organizations to award-winning performance

## Related

[Position Paper: From Tired to Inspired: 10 Steps for Improving Your Shared Services Brand](#)

For the latest thinking from EquaTerra on shared services, visit [www.equaterterra.com/sharedservices](http://www.equaterterra.com/sharedservices).

## EquaTerra’s Shared Services Brand Workshop Can Help

As depicted in Figure 2, brand alignment happens when your desired image, current reputation and performance and capabilities all overlap. If these three areas are not aligned, your brand is likely working against you and not for you.

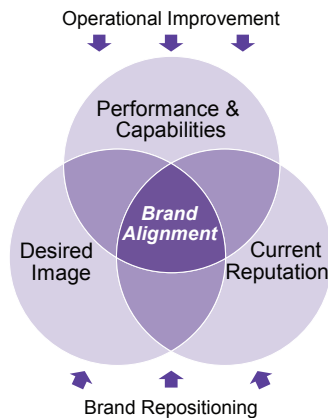


Figure 2

In achieving brand alignment, focusing on operational improvement can be a great lever – especially for those organizations challenged with meeting current service levels. Without discounting those efforts, we believe not enough attention is typically paid to “softer” factors of brand positioning. To meet this need EquaTerra has introduced a one-day, on-site workshop to help your shared services organization start building valuable brand equity. In the workshop, we help clients develop clarity around the brand they desire and the factors and actions that will help them realize it.

### About EquaTerra

EquaTerra sourcing advisors help clients achieve sustainable value in their IT and business processes. Our advisors average more than 20 years of industry experience and have supported more than 2,000 transformation and outsourcing projects across more than 60 countries. Supporting clients throughout the Americas, Europe, and Asia Pacific, we have deep functional knowledge in Finance and Accounting, HR, IT, Procurement, Real Estate and Facilities Management and other critical business processes. EquaTerra helps clients achieve significant cost savings and process improvement with internal transformation, shared services and outsourcing solutions.

www.equaterra.com

### Contact Us

Americas  
+1 713 470 9812  
infoamericas@equaterra.com

Europe/Asia Pacific  
+44 (0) 845 838 7500  
infoeuapac@equaterra.com

If you are interested in learning more about EquaTerra’s Shared Services Brand Workshop, please contact Rick Bertheaud for more information at 413 427 9952 or rick.bertheaud@equaterra.com.

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## Who Should Attend

Ideal workshop participants are shared services center leaders and their direct reports. This could be the cross-functional leaders of a multi-process center or the leadership from a single-process center, ideally totaling six to eight participants. This workshop is perfect for SSC leaders who have:

- Struggled to break out of the high-volume, back-office transactional space
- Tried engaging key customers with no response
- Experienced difficulty selling new ideas and services into existing clients
- Share a desire for integrating more creativity and innovation into their SSC’s offerings

## What to Expect

EquaTerra’s Shared Services Brand Workshop makes developing your brand easy and convenient. Your EquaTerra workshop instructor comes to your designated location and guides the team through a structured, 10-step process (outlined below) for enhancing your brand through improved satisfaction, expanded services, increased organizational relevance and the delivery of long-term strategic value.

### 10 Steps to Elevating Your Brand

1. Evolve from CRM to CEM (Customer Experience Management)
2. Converge and focus
3. Showcase fresh faces
4. Reposition services
5. Be a knowledge center
6. Think laterally
7. Re-engage stakeholders
8. Re-align with the organization
9. Solve the customer’s next problem
10. Seek and celebrate fame

The workshop starts by gaining a thorough understanding of the organization’s current situation versus its desired reputation. Throughout the following nine steps, the team discusses ideas and decides upon approaches and an action plan to achieve the desired state.

The EquaTerra workshop instructor will provide the tools and guidance you need to boost your brand and reach beyond consolidation, standardization and transitional excellence to reshape services in a way that drives long-term, relevant value. You will leave the workshop with a clear action plan.