

Securing Buy-In for Shared Services Rollout

Industry: Financial Services
Revenue: \$3B
Employees: > 5,000



Mission-critical priority

A head of global shared services needed to secure buy-in from his CEO as well as individual business unit leaders at his organization to fully implement shared services.



How Gartner helped

The client used:

- **Gartner advisory support** to outline a practical, step-by-step plan for architecting and launching shared services, which established strong governance and flagged key milestones to aid in performance measurement and continuous improvement.
- **Off-the-shelf templates** to take swift action against high-priority projects, and lessons learned from peer companies to avoid common missteps..



Outcome

With support from Gartner for Finance, the client:

- **Developed a shared services implementation approach** grounded in best practice, and stood up new, high-value shared services capabilities.
- **Shared new insight on shared services value** and guided relevant discussion and collaboration among key stakeholders.
- **Secured management's buy-in** for a full shared services rollout.