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Challenge Today. Define Tomorrow.

**Deloitte Shared Services Conference 2025
Insights Report**

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Foreword

MESSAGE FROM CONFERENCE CHAIRS

"It was a pleasure to return to Dublin, a city that truly stands as a vibrant hub for shared service activity, to host the 28th Shared Services Conference.

As we explored the complexities of modern business landscapes, it became clear that what might appear as chaos is, in fact, cohesion – a dynamic, living performance. This is the opportunity in front of us: to compose the soundtrack of tomorrow, based on how we play the notes today.

We witnessed first-hand how unified teams, working towards a collective goal, guided by clear strategic direction, and empowered by the effective integration of technology and AI can achieve outcomes far beyond what any individual or team could accomplish alone.

*This report distils these practical lessons and key insights shared by speakers and delegates alike, focusing on how organisations are **challenging convention** to shape their future. We encourage you to use them to lead with conviction, support your teams more effectively, and keep talent engaged as we collectively move forward to **define tomorrow** on our terms."*



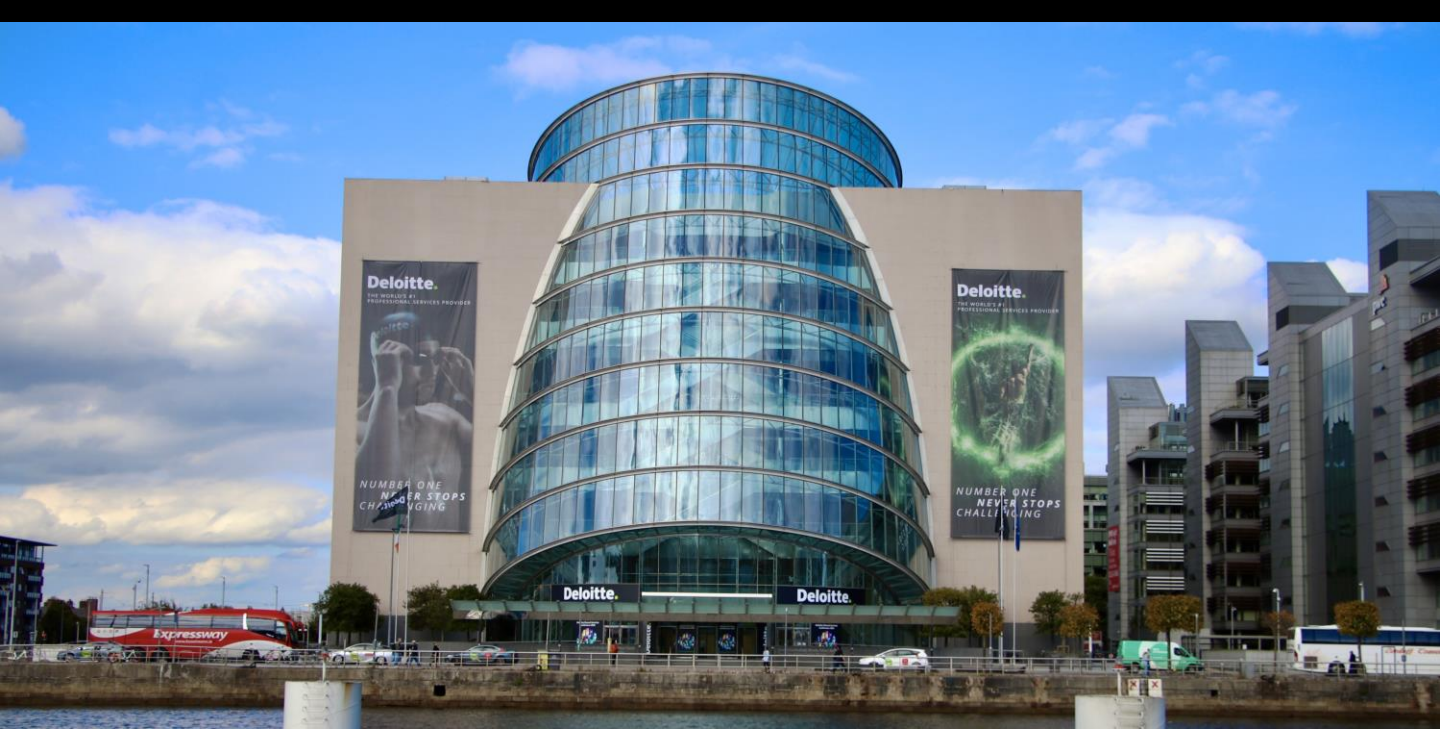
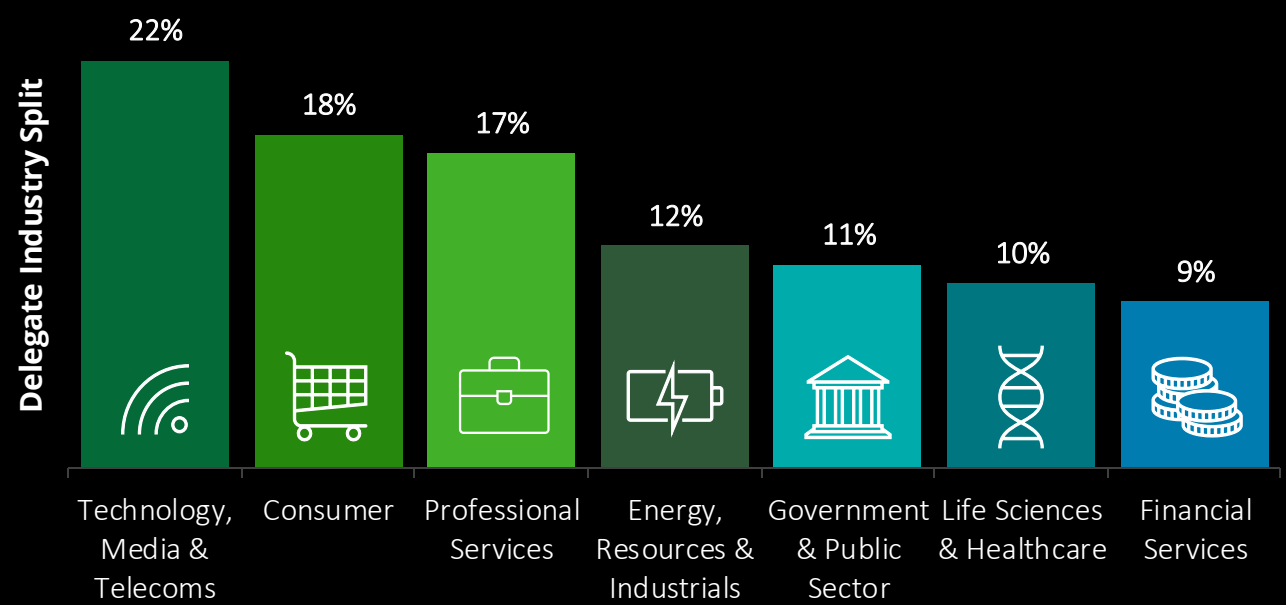
Aoife McCarthy
North South Europe
GBS Lead



Dorthe Harding Keilberg
Partner, The Netherlands

SSC25 in Numbers

CONFERENCE OVERVIEW



Speaker Sessions

KEY LEARNINGS FROM INDUSTRY LEADERS

IN THE DRIVER SEAT OF DIGITAL TRANSFORMATION

GBS organisations hold a unique position to steer and influence the enterprise's digital transformation in the age of AI. To succeed, technology solutions and how they are built, must align with strategic and tactical priorities, from a foundation of clean, structured data.

TOMORROW'S TALENT & SKILLSETS

It's time for GBS to become a talent magnet. Future talent will be defined by those who understand technology's potential but also have core human skills that a bot or agent cannot replace. GBS organisations must invest in upskilling and rethink hiring approaches.

THE NEW BENCHMARK FOR EXPERIENCES

Intuitive and personalised consumer experiences are increasing expectations in the workplace. Meeting them demands deep and continuous customer listening & engagement. And whilst technologies can be leveraged to deliver, always align with evolving user needs.

TRANSFORM FOR VALUE. SCALE WITH SPEED.

The role of GBS is moving beyond cost savings to strategic hubs that prioritise business outcomes and service quality. The goal is not just to demonstrate value, but to scale it, whilst carefully balancing global standardisation with local customisation.

EMBRACING AGILITY & RESILIENCE

GBS organisations must embrace transformation by integrating agile delivery models when engaging with the wider business, fostering a culture of innovation, and embedding continuous improvement to navigate dynamic business landscapes effectively.





Read the [AI GBS PoV](#) to explore this topic in more detail

Digital Crossroads

IN THE DRIVER SEAT OF DIGITAL TRANSFORMATION

The digital landscape is rapidly evolving, growing in complexity far beyond basic process automation. GBS organisations, such as Sanofi's, are uniquely positioned to be strategic enablers, breaking down technological barriers to drive enterprise-wide change. With a clear CEO mandate to embed AI at its core, Sanofi can deploy new technologies across functions at pace, unlocking significant opportunities for enhanced efficiency, optimised costs, and improved service delivery.

Achieving this requires tailored strategies: building bespoke solutions for competitive advantage, buying off-the-shelf platforms for rapid deployment, or partnering with specialist vendors for cutting-edge capabilities and scalable growth.

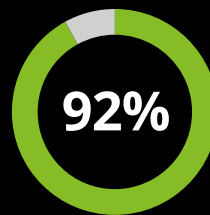
Deloitte's Emmanuel Adeleke outlined the various factors when finding the right strategy for your organisation, including time constraints, available expertise and integration ease.

Central to scaling digital solutions is clean, well-governed data. This is crucial for improving accuracy, reducing manual effort, and generating actionable insights. Majella Mungovan from Meta used a "Smart City" analogy, demonstrating how data forms the essential infrastructure for advanced AI solutions.

She also highlighted that successful digital adoption and continuous improvement hinge on targeted upskilling and fostering a growth mindset, demonstrated by Meta's volunteer-led 'Finance Academy.' Investing in this development empowers employees with the essential technical, analytical, and adaptive skills needed to effectively leverage advanced tools.



Seb Burnett, Deloitte & Ryan Burger, Sanofi



of organisations are leveraging or planning to leverage AI in their Service Delivery¹

¹Deloitte Global Outsourcing Survey 2024

If you don't standardise and you start automating fragments, then that's not the most efficient way...We have no moved so much into our global services, we really have a very holistic view; a helicopter view.

Thomas Bloemen, Kühne + Nagel

KEY TAKEAWAYS



Invest strategically in **data quality and integration** as the foundation of your digital transformation



Foster a **culture of trust** and **invest heavily in learning** to provide the workforce with the skills to embrace and leverage AI



Deliver tangible business outcomes by combining **data-driven insights with deep domain expertise**

Reimagining Talent

TOMORROW'S TALENT & SKILLSETS



GBS Talent Panel Discussion

GBS is currently facing an identity crisis, particularly as organisations navigate a new era of transformation. As highlighted by Deborah Kops from Sourcing Change, GBS has historically been perceived as fostering cost-cutting, limited career paths, and outdated learning agendas.

The pace of innovation means that technical skills are becoming outdated at an accelerating rate. However, as Majella Mungovan from Meta stated, the future of work isn't about AI replacing jobs, but rather those who understand its potential and master its application.

Deloitte's Kort Syverson believes that core human capabilities are largely irreplaceable by AI and should form at least 50% of the skillset of future talent. Echoing this sentiment, Ana Martins shared how Syensqo established four GBS academies: AI Galaxy, Customer Service Mindset, Service Excellence, and Leadership Expedition. These academies

GBS is not just a talent engine, but a talent magnet. We either need to build the breeding ground for talent, or it will become the graveyard of ambition.

Deborah Kops, Sourcing Change

are designed to provide their people with the skills to lead transformation effectively. In parallel, GBS organisations must also pivot their hiring strategies and philosophies. They need to rip up the rule book, including rewriting job descriptions for future needs and interviewing for softer skills.

With its unique perspective on business operations and strategy, GBS holds the potential as an attractive career destination and talent pathway for aspiring enterprise leaders. An active effort is essential in combatting the misconception that GBS is merely "behind the curtain", instead promoting its strategic value and role in innovation.

Younger talent seek movement, variety, and purpose. They can be attracted through comprehensive learning pathways, internal mobility strategies, and rotation programmes. By shaping a compelling value proposition focused on continuous learning, GBS can effectively attract and cultivate the enterprise leaders of tomorrow.

KEY TAKEAWAYS



Prioritise **hiring for future-ready attributes** like logical thinking, communication, and empathy, over narrow technical skills



Develop **dynamic career paths** and **data driven talent rotation programmes** to attract talent and create agile teams



Invest in **upskilling and leadership development** to empower talent to proactively acquire new skills

The Experience Revolution

THE NEW BENCHMARK FOR EXPERIENCES

Fragmented processes, limited self-service capabilities, and inconsistent service quality often characterise the current state of customer experience in shared services. This frequently leads to transactional and impersonal interactions, resulting in frustration and reduced productivity.

As employee expectations grow exponentially to mirror the consumer experiences found in their daily life, organisations are compelled to deliver more intuitive and personalised services. HSE's Damien McCallion shared the implementation journey of an ERP system across their health services. He emphasised the critical shift from merely efficient processing to delivering intuitive, consumer-style digital experiences that support frontline staff such as GPs and pharmacists and enhancing patient care.

However, achieving such experiences first demands a deep, holistic understanding of customer needs. Gillian Kulkarni from Google explained how their CoEs collaborate to analyse end-to-end processes, ensuring consistent service levels across all operations.

Equinor's session addressed a specific end-user challenge: inefficiency in finding and accessing internal resources and services, stemmed from a lack of user design. Karan Saggi and Stein Petter Aannerud showcased the transformative power of digital technologies, presenting "Equinor Search" – a unified, AI-powered platform. By launching iteratively, driven by continuous user feedback, they were truly able to listen to the customer.

While analytics, automation, and AI offer potential to enhance customer experience, Equinor's session shared that AI should only be integrated when it aligns with user expectations, rather than being adopted merely for its own sake.



Max Handforth, Liberty Blume

They don't need someone to give them a BI power chart with 45 options and 55 drill-downs. They need someone to tell them: 'Here's the insight, here's the problem, here's the solution.'

Damien McCallion, HSE

KEY TAKEAWAYS



Foster a culture around **customer centricity** and **continuous improvement**, with a hyperfocus on understanding user needs



Upskill teams on empathy and service design and **establish clear CX metrics** with operational consistency



Treat internal colleagues as true business partners to build trust and shared purpose

A New Era of Value Creation

TRANSFORM FOR VALUE. SCALE WITH SPEED.



Ricardo Mueller, Reckitt



Increase in number of GBS organisations delivering Supply Chain or Manufacturing in last 5 years¹

¹Deloitte GBS Survey 2025

Do not think like a task operator, but be a value enabler with focus on business outcomes and not just processes. Don't be afraid to start small. Prove yourself and then iterate. But when you're ready to iterate, be prepared to deliver scale at speed.

Aoife Allen, Pfizer

In 2020, 70% of organisations cited cost savings as their main driver for shared services and outsourcing. By 2024, this dropped to 34%, reflecting a growing adoption of outcome-based delivery models.¹ Business are now strategically prioritising talent, service quality, global delivery and agility, alongside traditional cost savings.

This evolution signals a fundamental shift from purely transactional processes to integrated strategic hubs. Embracing end-to-end optimisation, agility and innovation are paramount for streamlining operations and unlocking higher-value work. Mirta Hegedusic at thyssenkrupp spoke to the levers they pull on such as lean methodologies, automation bots and regular benchmarking for continuous improvement to achieve this despite operating in a high-cost environment.

Pfizer's Aoife Allen and PMI's Ricardo Mueller both highlighted the importance of balancing globally standard processes, underpinned by strong governance, with market-level flexibility. This customisation should only be introduced when it delivers clear business value or compliance.

The critical importance of top-level leadership, vision, and commitment was evident at Astellas, where Kamila Grembowicz, Head of GBS, maintained an

on-the-ground presence while establishing three new Global Capability Centres. Similarly, Man Truck & Bus significantly benefited from the strong sponsorship of their CEO, CFO, and CHRO as they pursued a fully integrated GBS model.

KEY TAKEAWAYS



Re-imagine service delivery to **prioritise end-user outcomes** and drive lasting value for customers



Apply a "vanilla with sprinkles" approach, **balancing global standardisation with customisation** for local nuances



Provide strategic direction and **champion strategic initiatives** as leadership, remaining visible for trust and continuity

Riding the Wave of Change

EMBRACING AGILITY & RESILIENCE

Deloitte Economists Ian Stewart and Kate English outlined the profound impact of external macroeconomic pressure – from global tariffs to geopolitical instability to AI investment to evolving spending priorities – on today's dynamic business landscape. In response, GBS organisations must embody both agility and resilience, not just to survive, but to thrive.

Achieving agility requires strong synergy with the broader enterprise. Kühne + Nagel has mirrored its organisational structure within its service centre. This approach ensures seamless GBS integration and alignment with the overarching business strategy, preventing a growing gap with business units.

Kamila Grembowicz from Astellas explained how their three new Global Capability Centres are being set up to move away from traditional multi-layer approvals. This allows for faster and more proactive decision-making in a constantly changing landscape, whilst empowering teams with clear, outcome-focused objectives.

The pandemic demonstrated the critical need for organisational resilience. Faced with significant staffing shortages and disruptions, Air France-KLM accelerated the migration of back-office activities into their shared services. Jan Joost Hoek shared that coupled with the establishment of Global Process Owners, not only has long-term organisational resilience been built but also provided the foundation for evolving their shared services into a fully integrated GBS organisation.



Damien McCallion, HSE

It's not the service centre deciding what moves to the service centre. It's a business decision and it's much bigger than that...This is about centralisation and your target operating model.

Thomas Bloemen, Kühne + Nagel

Resilience is what keeps us moving. Every setback can be a win because it's just an understanding of what didn't work.

Aoife Allen, Pfizer

KEY TAKEAWAYS



Align and integrate an agile delivery model with the wider business to **demonstrate enterprise-wide agility**



Establish **continuous improvement as a foundation** of your delivery model to respond and iterate with feedback loops



Champion a **culture of innovation** where evolving business needs are transformed into catalysts for value creation

Guest Speaker

LAUREN FORROW, MORE THAN EQUAL



Despite Formula 1's global surge in popularity, no woman has ever reached the podium; a stark reality More Than Equal aims to change by developing the first female F1 world champion.

Lauren Forrow, Head of Driver Development at More Than Equal, shared that the current driver development system has inadvertently created systemic barriers for women. These include a substantial participation gap – women make up only 7% of motorsport participants – and a perception of female drivers as riskier investments, often due to historical lack of representation. Lauren challenged misconceptions about physical capabilities, drawing comparisons to female fighter pilots to demonstrate that physical and technical skills are trainable, and the focus should instead be on core attributes like grit and competitiveness.

A key takeaway was the need to redefine talent beyond traditional, often male-centric, definitions (e.g., "aggressive" or "confident"). More Than Equal focuses on underlying traits like "bravery", such as taking a gap in a race, to achieve outcomes, recognising that performance is a deeply human experience requiring customised development. This involves data-driven tracking of physical, cognitive, and behavioural aspects, tailoring programmes to individuals.

The organisation itself embodies diversity, with a team from varied industries, viewing this as a "superpower" that creates better solutions and balanced perspectives. Lauren highlighted that genuine integrity and belief in diversity must be role-modelled by leadership, creating psychologically safe environments where talent can learn and thrive. Ultimately, achieving systemic change requires long-term investment and strategic partnerships. So, while quotas may offer short-term fixes, lasting transformation demands a fundamental shift.



KEY TAKEAWAYS



Leverage data and research, rather than assumptions or historical practices, to identify overlooked talent



Broaden and change the definition of talent beyond traditional metrics or characteristics



Champion diversity through behaviours and values and use it as a strategic advantage

Guest Speakers

DR TOM BATES, SPORTS PSYCHOLOGIST

It's not just what we do, it's how we make people feel.

Recognising the need for a mindset shift from “playing not to lose” to “playing to win” as part of their S4 HANA implementation, Bakkavor engaged Dr Tom Bates, a sports psychologist who has worked with Team GB and Premier League teams, to facilitate this change.



The primary objective was to proactively manage people's responses and narratives to change. This was achieved

by creating immersive experiences, rather than simply presenting plans, which were rolled out across all organisational levels, from the CEO downwards. Adapting performance psychology practices for the boardroom, these sessions equipped employees with vital tools for resilience and healthy conflict.

Dr Bates emphasised that in high-stakes environments, mindset is the ultimate determinant of performance, with those mentally and emotionally prepared performing the best under pressure.

Winners hate to lose, but winners aren't afraid of losing. We have to dare to lose, in order to win.

Through engaging audience participation activities, he demonstrated practical techniques that illustrated the profound interconnectedness of physical and mental states and how they can be consciously managed to achieve an optimal emotional state.

DANIEL WIFFEN, OLYMPIC GOLD SWIMMER

Irish Olympian Daniel Wiffen offered compelling insights into leveraging data and analytics as a core strategy in his relentless pursuit of peak performance. He encouraged business leaders to embrace incremental optimisation and data-driven insights to unlock exceptional results. Daniel further highlighted the critical importance of marginal gains – the crucial milliseconds that can make all the difference in securing a gold medal.



Pre-Conference Day

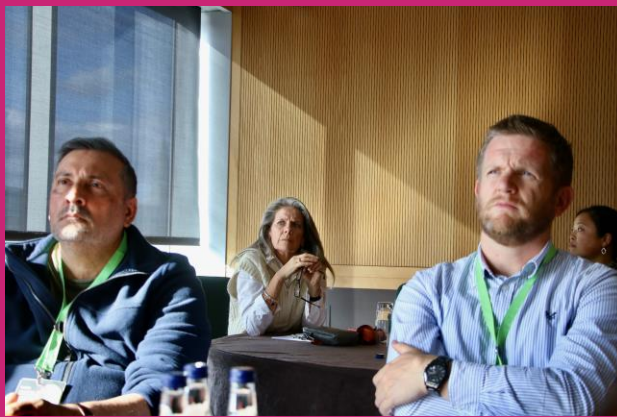
DISCUSSING THE HOTTEST GBS TRENDS & TOPICS

The Pre-conference Day offers delegates a unique opportunity to engage in a series of collaborative sessions addressing topics at the forefront of GBS leaders' agendas. It encourages delegates to **share their experiences, learn from peers, brainstorm solutions, and create meaningful connections.**

This year, a record **9 Labs** were held, including those sponsored by **Google and ServiceNow**. Dublin's strategic GBS location also allowed some delegates to get a first-hand experience by visiting **Pfizer's Dublin Hub**.

Location Strategy

Organisations are diversifying their presence, driven by rising costs in traditional hubs, geopolitical shifts, and new regulations. This, alongside the pursuit of specialised talent, increases the focus on establishing Centres of Excellence to centralise expertise, drive efficiency, and foster innovation.



Value-driven Delivery

Shared services are expanding outsourcing to strategic functions (e.g., Supply Chain, Legal) to leverage specialised capabilities and boost business impact. This involves a shift to outcome-based pricing, linking service delivery to business KPIs for value creation and alignment.

Role of Agentic AI

Agentic AI is transforming shared services as an autonomous "digital co-worker," freeing human resources for higher-value activities through efficiency gains, automation, and reduced errors. However, its adoption faces challenges related to data quality, robust governance, and privacy.

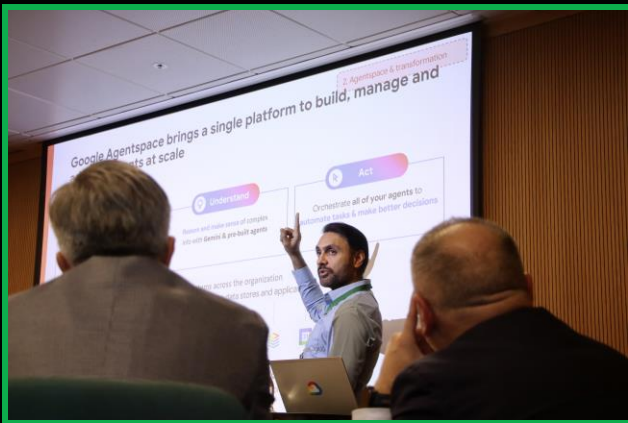


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Readiness for Transformation

Implementing ERP systems and AI, demands extensive strategic planning. Key elements for success include clear objectives, comprehensive data readiness, and strong governance frameworks. Furthermore, breaking down organisational siloes is crucial for fostering collaboration.

Future Talent

The integration of AI is revealing talent shortages and an underdeveloped digital workforce. A human-centric approach is required for upskilling and continuous learning. Furthermore, cultural readiness is key to effectively manage employee concerns and foster seamless human-AI collaboration.



Change & Stakeholder Management

Early and transparent change management is critical to implementation. This involves more than just communication; it's about fostering stakeholder buy-in from the start through clear messaging and strong, empathetic leadership.



Shared Services Awards

CELEBRATING SUCCESS IN THE INDUSTRY

The prestigious Deloitte Shared Services Awards **celebrate and recognise outstanding leaders, organisations, and achievements** across the GBS industry.

The nomination process started 6 months prior to the conference and submissions were shortlisted by Deloitte GBS Leaders to select the **three finalists per category**. An **independent judging panel** comprised of this year's event Speakers and Leaders then heard directly from the nominees, one compelling story after the next.

This year's awards explored the remarkable talent and innovation within our GBS community, with an **exceptional volume and quality of nominations**.

Our heartfelt **congratulations extend to all winners, finalists, and nominees!**

BEST IN CLASS TALENT DEVELOPMENT



Allianz Services Romania

TECHNOLOGY TRANSFORMATION CHAMPION



NTT DATA INC.

GBS CHANGEMAKER



General Accounting Services: SAP
Anne Pearson

ESG PIONEER



Novartis

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