

SERVICE PILLARS

4
5
6
6
7
8
9
10
11
12
13
14

FINANCE & ACCOUNTING

Service Delivery Lines - % centres delivering a given line
Maturity of Service Delivery Lines
PARTICIPATING COMPANIES

TABLE OF CONTENTS

HR SERVICES

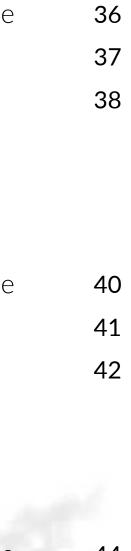
Service Delivery Lines - % centres delivering a given line	20	Service Delivery Lines - % centres delivering a given line
Maturity of Service Delivery Lines	21	Maturity of Service Delivery Lines
Companies delivering hr services	22	PARTICIPATING COMPANIES
IT DESIGN & DEVELOPMENT		FINANCIAL SERVICES & INSURANCE
Service Delivery Lines - % centres delivering a given line	24	Service Delivery Lines - % centres delivering a given line
Maturity of Service Delivery Lines	25	Maturity of Service Delivery Lines
PARTICIPATING COMPANIES	26	Companies delivering hr services
IT (INTERNAL)		SALES & MARKETING
Service Delivery Lines - % centres delivering a given line	28	Service Delivery Lines - % centres delivering a given line
Maturity of Service Delivery Lines	29	Maturity of Service Delivery Lines
PARTICIPATING COMPANIES	30	PARTICIPATING COMPANIES
PROCUREMENT		ACKNOWLEDGEMENTS

Service Delivery Lines - S Maturity of Service Delive PARTICIPATING COMPANIES

% centres delivering a given line	
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ANIES	

CUSTOMER SERVICE

CONTACT US

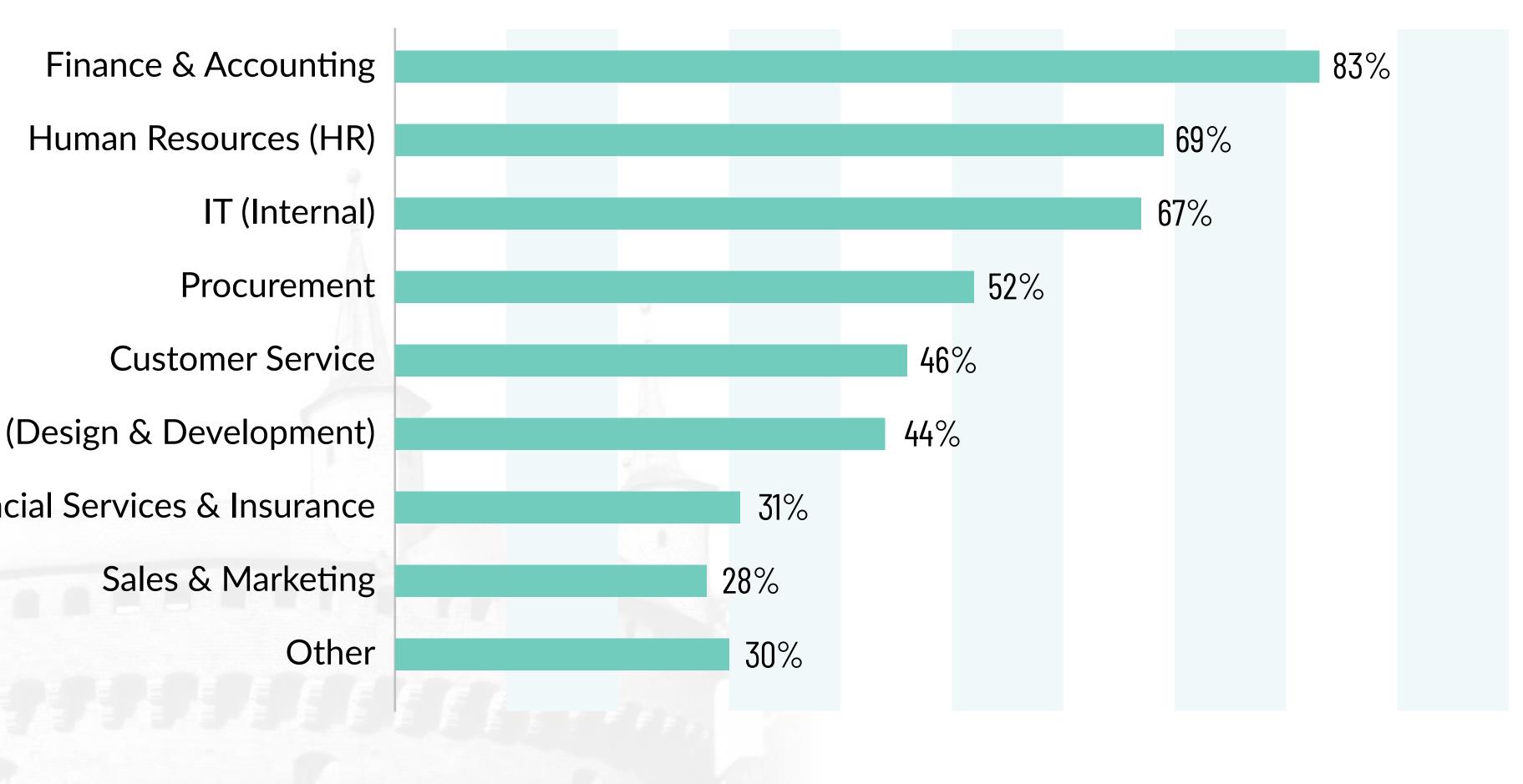






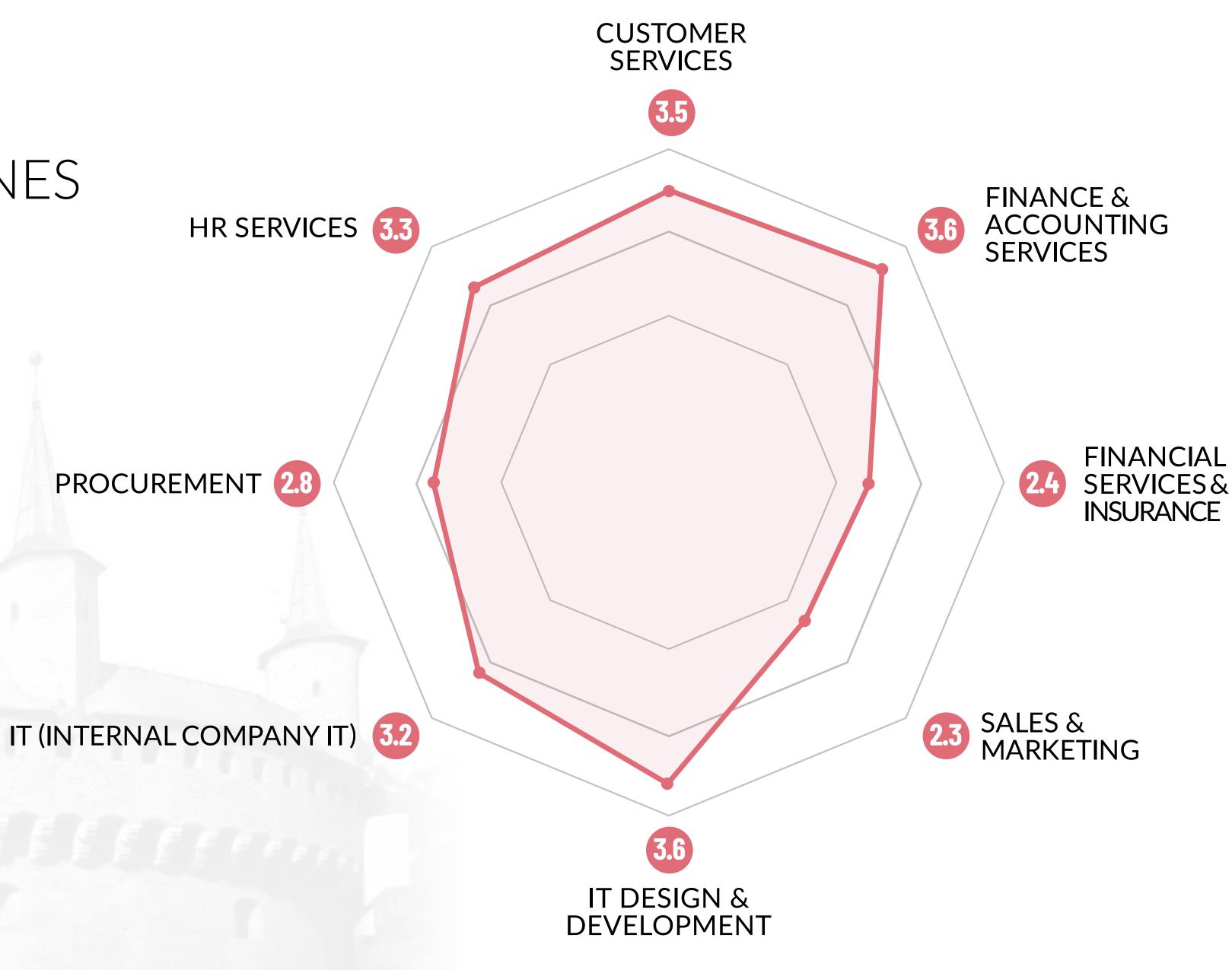
SERVICE DELIVERY LINES % centres delivering a given service line

Finance & Accounting Human Resources (HR) IT (Internal) Procurement **Customer Service** IT (Design & Development) Financial Services & Insurance Sales & Marketing Other





MATURITY OF SERVICE DELIVERY LINES









6%

24%

TYPES of CENTRES

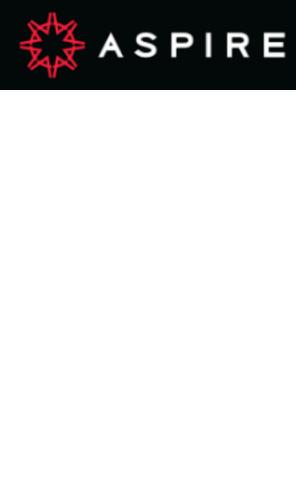
Multi-Functional Centres

46%

Single Tower: IT Design & Development

Single Tower: Other Delivery Lines

Single Tower: Finance



AVERAGE CENTRE SIZE ACCORDING TO TYPE

MULTI-FUNCTIONAL CENTRES

.........

SINGLE TOWER: FINANCE ••••••

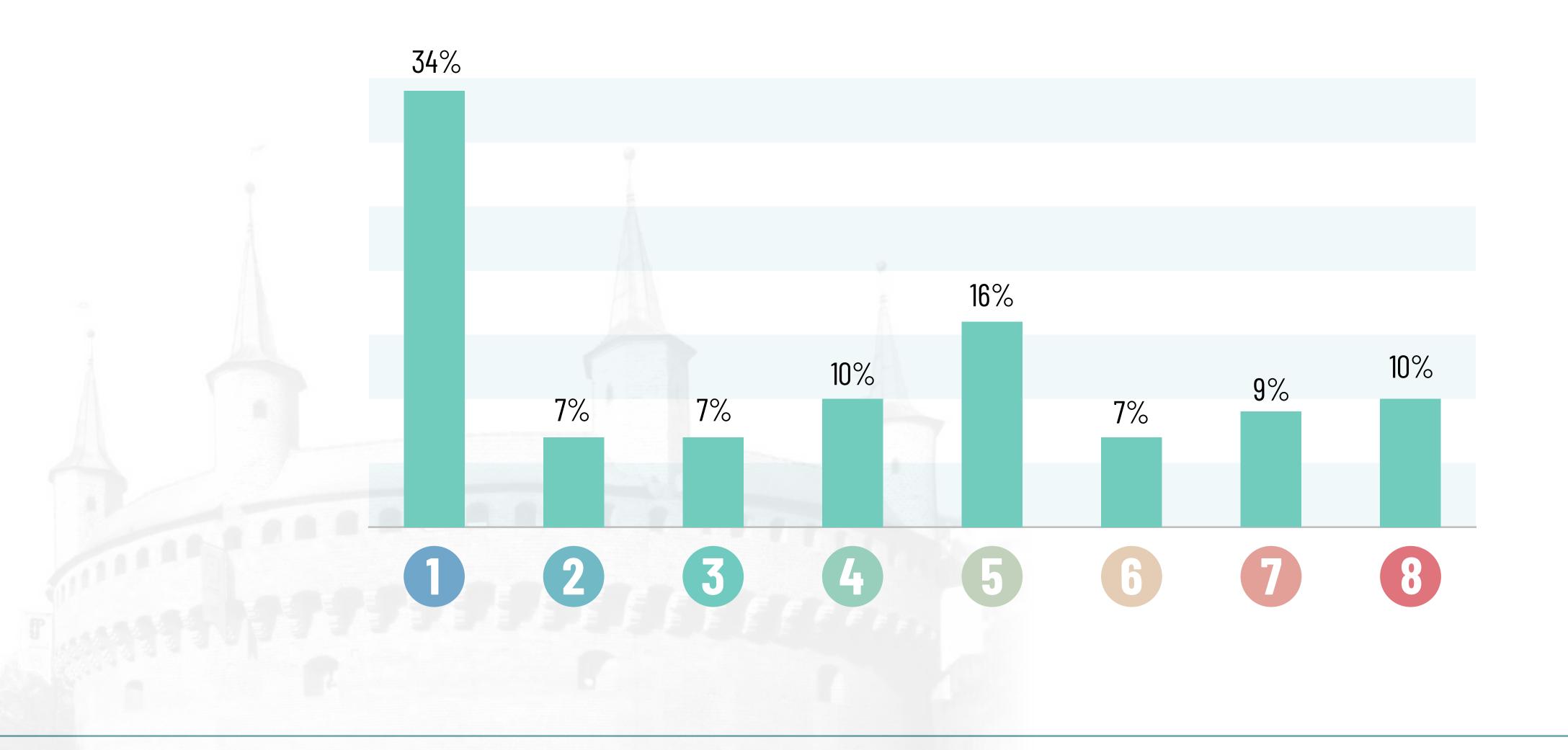
SINGLE TOWER: **IT DESIGN & DEVELOPMENT**

SINGLE TOWER: OTHER DELIVERY LINES •••••• ••••• ••••• •••••



6

NUMBER OF SERVICE DELIVERY LINES IN CENTRES







In the last 12 months has your centre taken over any **new transactional processes?**

29% NO

Accounting:

- AP Service Desk
- Cash Application
- Project accountingT&E Compliance

Procurement:

- Material planning
- Transportation Management

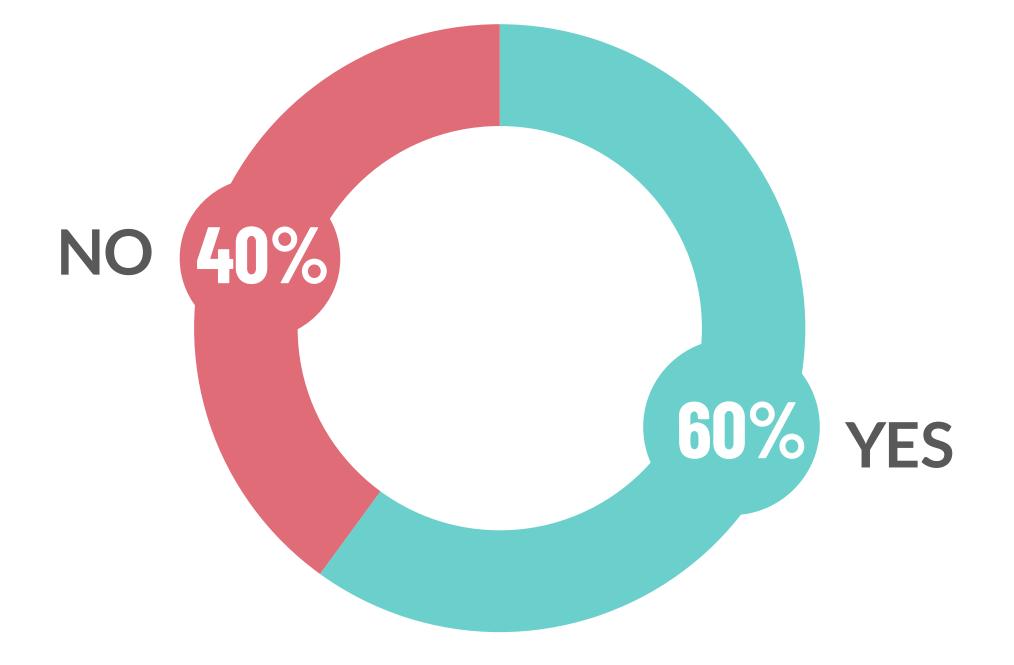
71%

YES

• Logistic



In the last 12 months has your centre taken over any **new knowledge-based processes?**



Accounting:

- FP&A
- R&D Finance
- Financial Compliance & Audit
- Statutory Accounting & Tax activities

IT:

• Cloud Development

Procurement:

- Strategic SourcingEngineering to Order

Other:

- Legal
- Disruptive technology
- Service Management



In the last 12 months has your centre implemented any significant Transformation Programmes?

e.g., System implementations, language unification, unified data model implementation, etc.

TECHNOLOGY

Implementation:

- New ERP: S4Hana, MS 365, Oracle EBS
- ServiceNow

Digitalization and Automation:

- RPA Setup
- HR
- Sales Operations
- Manual tasks
- Development of Inhouse system

OTHER

- Post Merger Integration
 Insourcing of AP and AR processes
 Service Delivery Model simplification
- New Indirect S2P
- New omnichannel provider for Customer Contact team
- Client Data Model
- Multiple Continuous Improvement projects

(Process Improvement, Scope standardization, process standardization, tools implementation, knowledge sharing platforms, pre study, etc.)



41% NO



59%

In the last 12 months has your centre supported transition of your existing processes to an **external provider?**

Accounting:

- Accounting:P2P & R2R
- GL accounting (selected process)

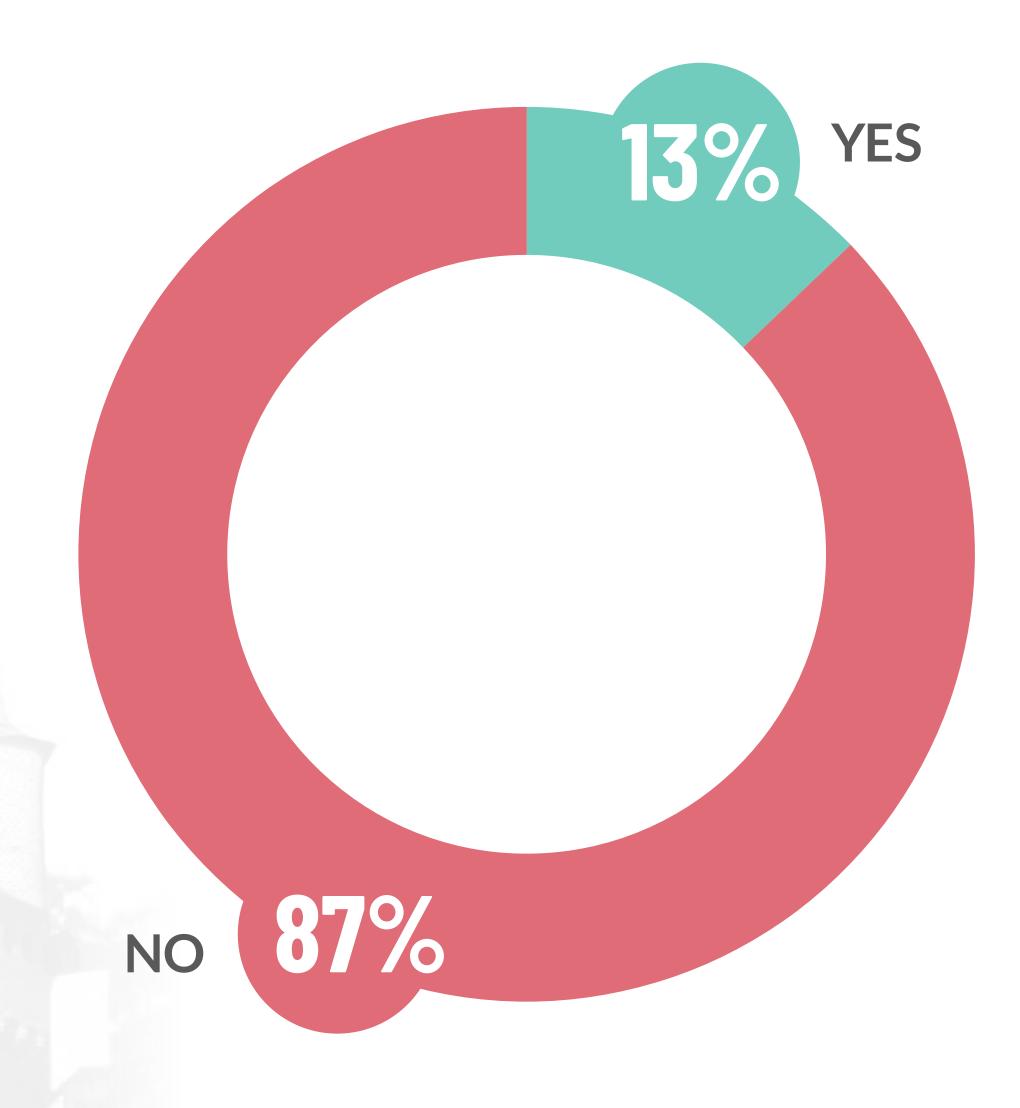
HR:

- Talent Acquisition
- Payroll
- HR systems
- HR Ádmin

Other:

• WFM / Rostering





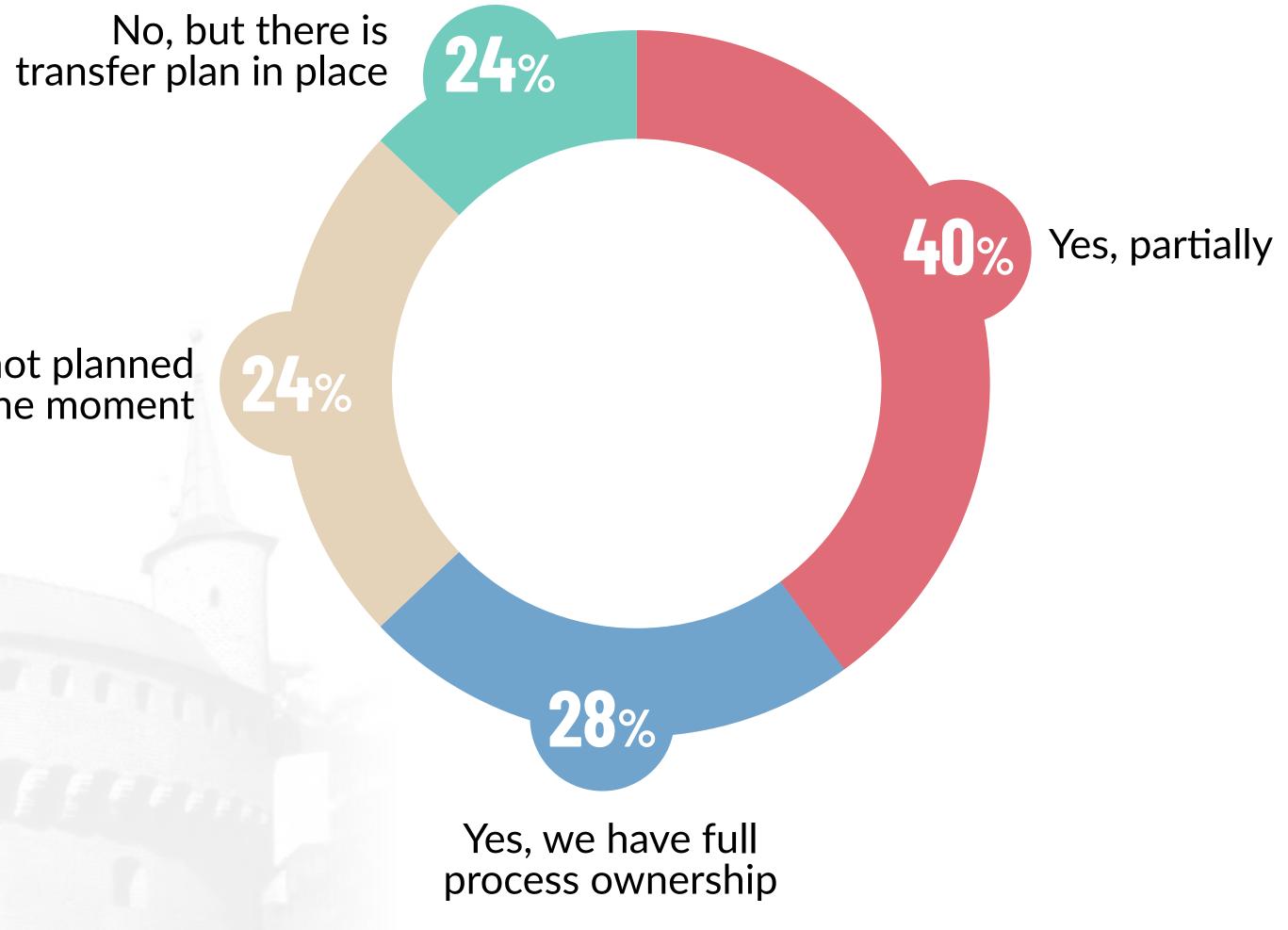




HAS THE PROCESS OWNERSHIP BEEN TRANSFERRED TO YOUR CENTRE?

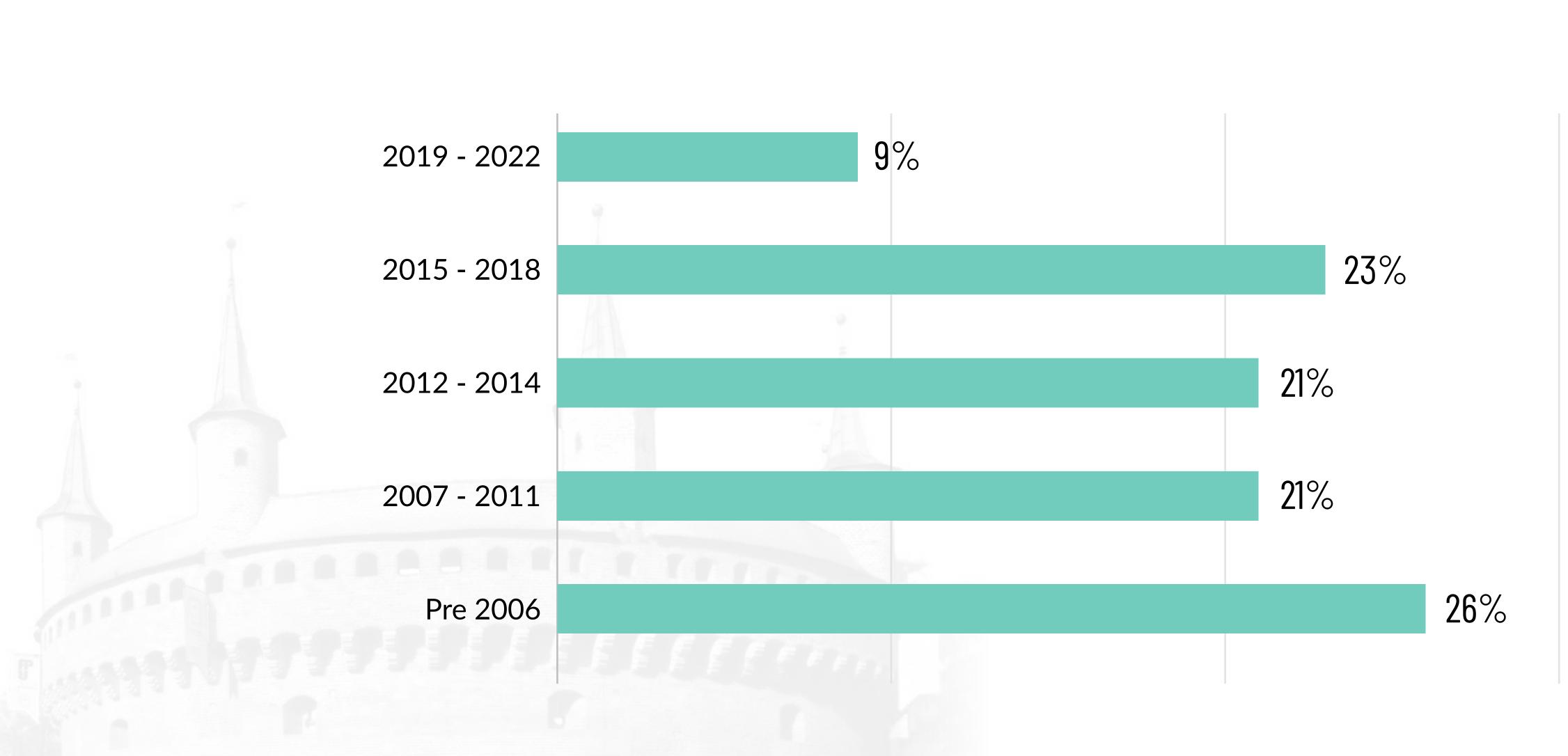
No, it is not planned at the moment







AGE OF MULTI-PILLAR CENTRES





12

Have you established the following **internal functions** to support your Centre's development?

Continuous improvement

Simple automations (e.g., VBA, MS Excel)

Dedicated data analytics / dashboarding team

PMO

Automation solutions - RPA (e.g., Uipath, Blue Prism, other)

Advanced Automation (AI, Machine Learning, Deep Learning, Intelligent Document Understanding)

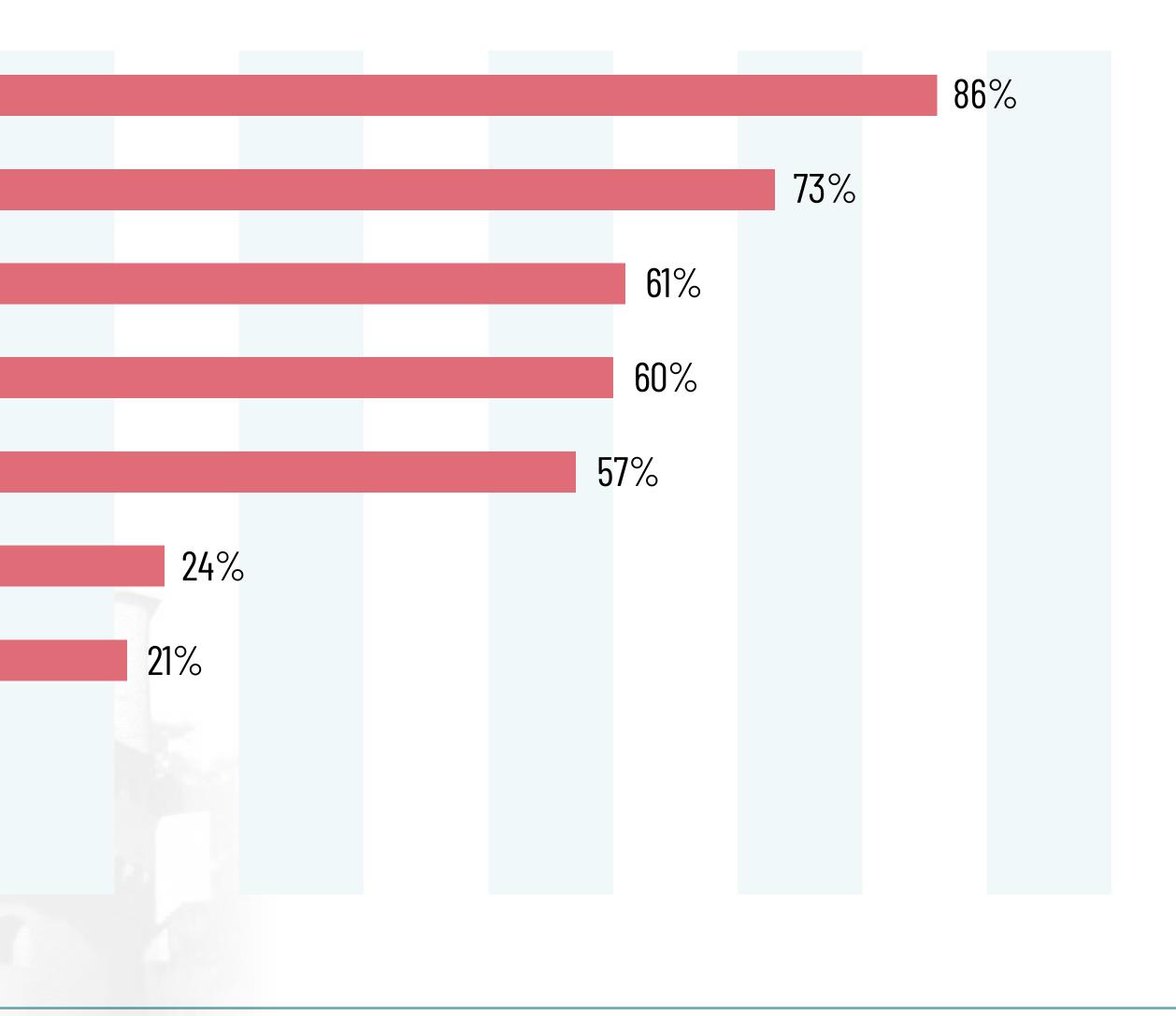
> **Conversational AI** (Intelligent Chatbots, Voicebots)

> > None of these

4% 3%

Other











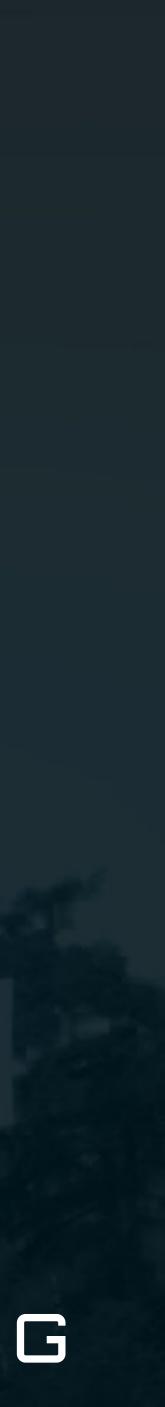
PARTICIPATING COMAPNIES







FINANCE & ACCOUNTING



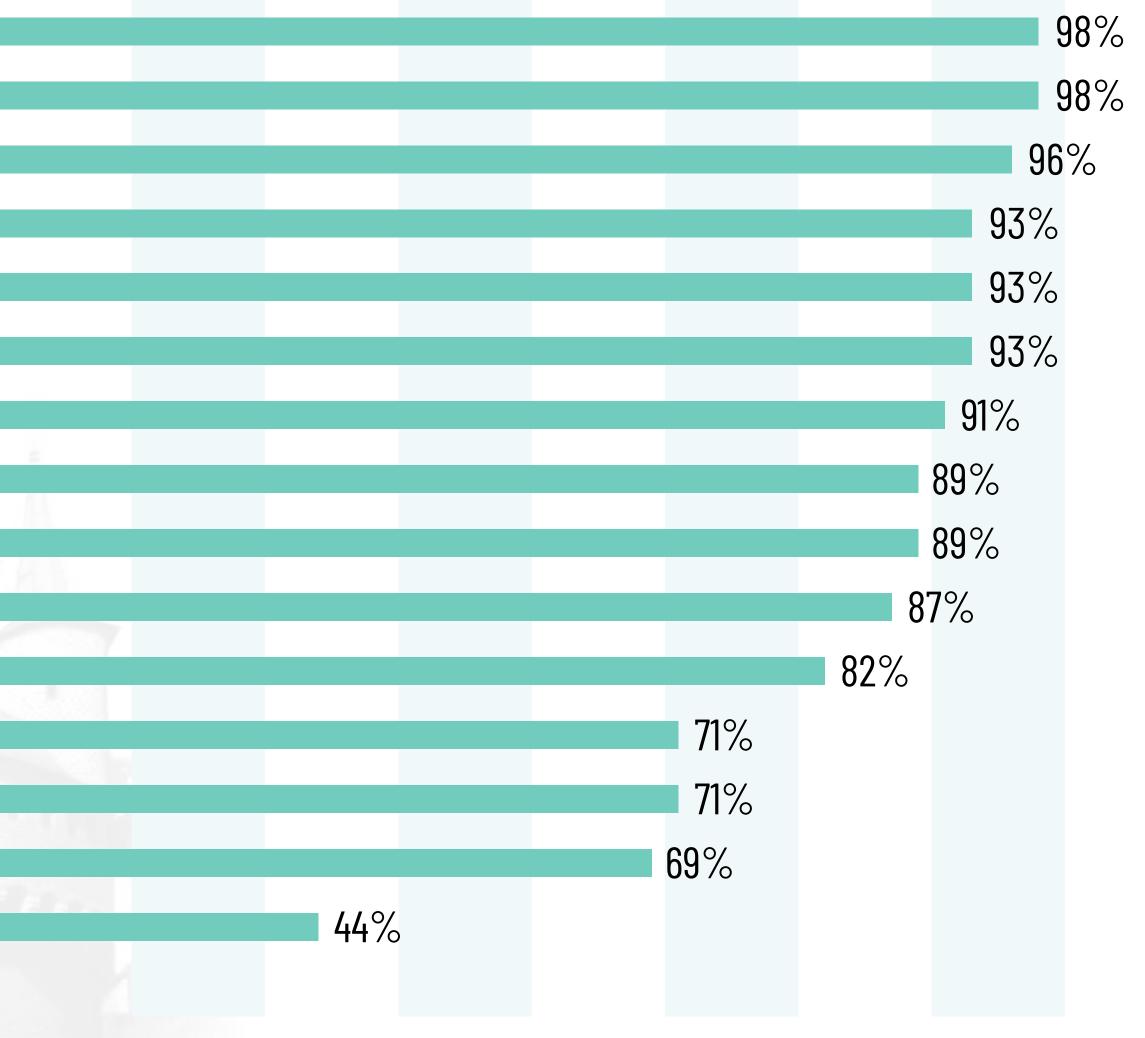
SERVICE DELIVERY LINES

% centres delivering a given service line

Financial Reporting and Analytics Financial Period closing Intercompany accounting Accounts Payable Accounts Receivable Tax Compliance & Accounting Cash Management and Treasury operations Fixed Assets Accounting Financial Planning & Analysis Masterdata Management Statutory Accounting and Reporting Transfer Pricing Consolidation **Internal Audit** ESG Reporting

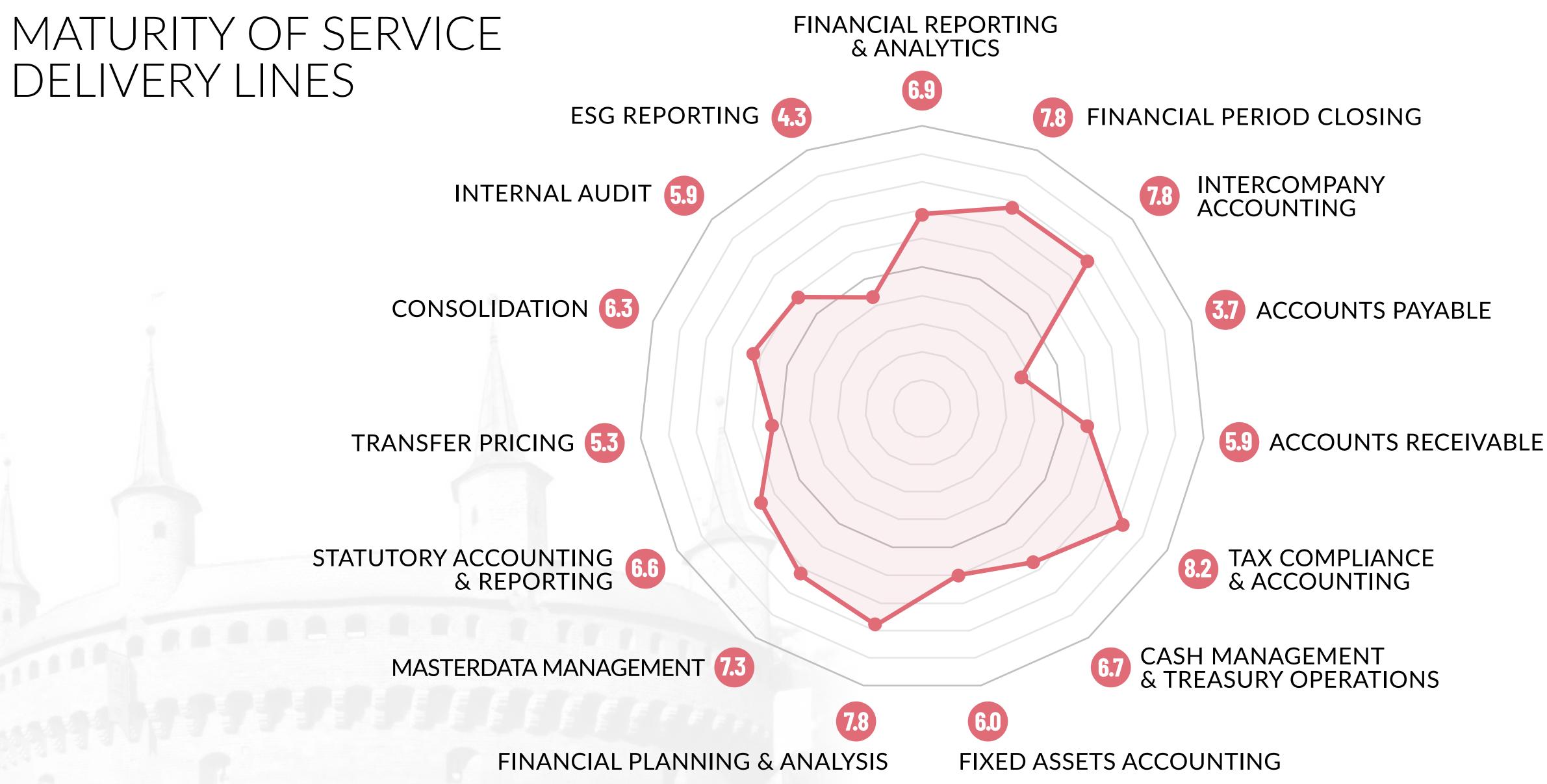
(Environmental, Social and Governance)





16

MATURITY OF SERVICE DELIVERY LINES







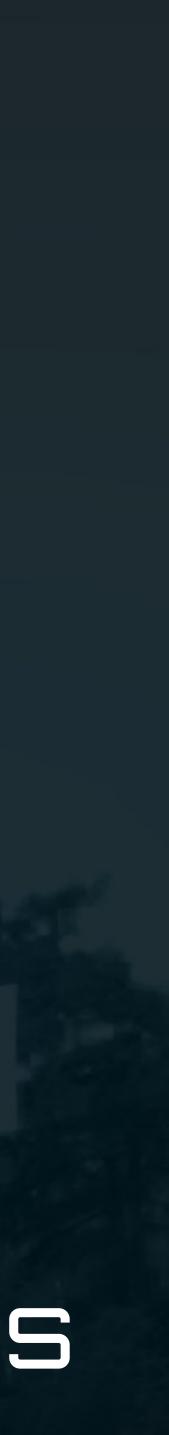




PARTICIPATING F&A COMAPNI



HR SERVICES



SERVICE DELIVERY LINES

% centres delivering a given service line

Workforce administration

Talent Acquisition (Recruitment & Sourcing)

Payroll

Reporting

Helpdesk

Total Rewards

Learning & Development

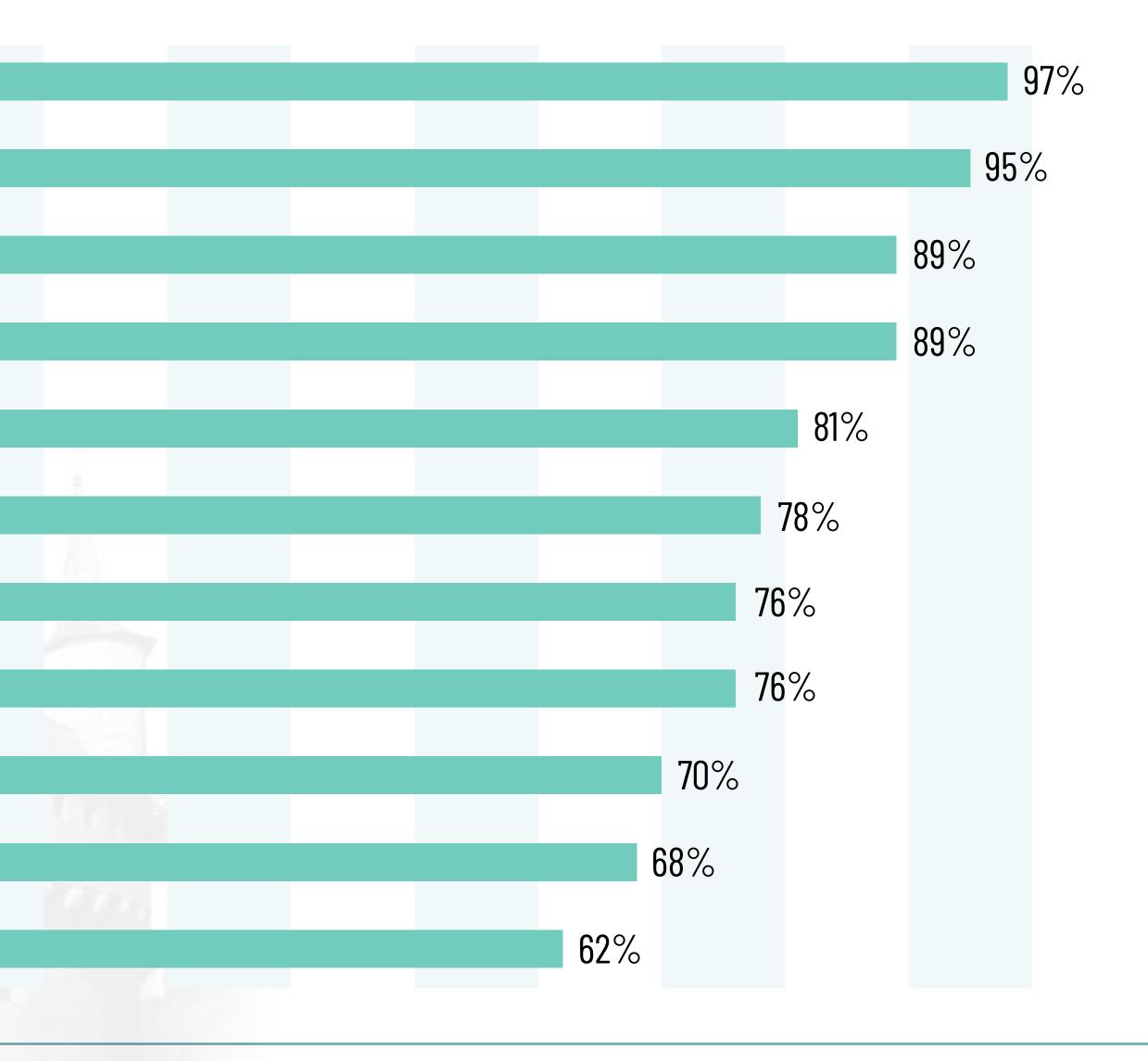
Talent & Performance Management

Employer Branding support and strategy

Global mobility

Pension & Retirement related services









MATURITY OF SERVICE DELIVERY LINES

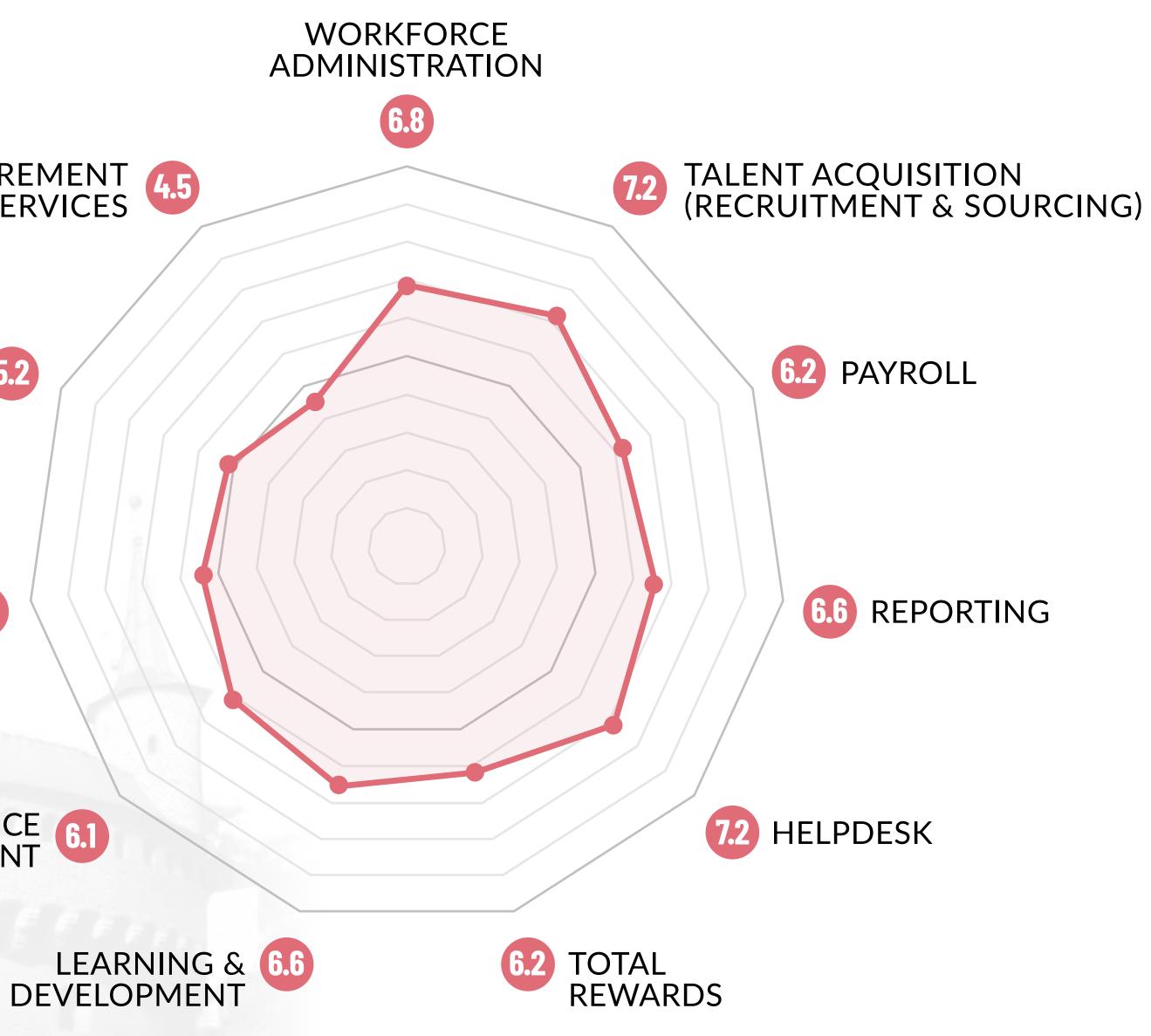
PENSION & RETIREMENT



EMPLOYER BRANDING 55 SUPPORT AND STRATEGY

TALENT & PERFORMANCE 61 MANAGEMENT











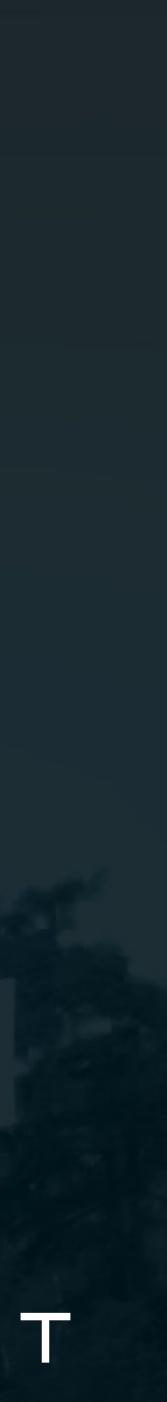
COMPANIES DELIVERING HR SERVICES







IT DESIGN & DEVELOPMENT



SERVICE DELIVERY LINES

% centres delivering a given service line

Software Development

Architecture for software and systems

ALM – Software maintenance

IT Product Management

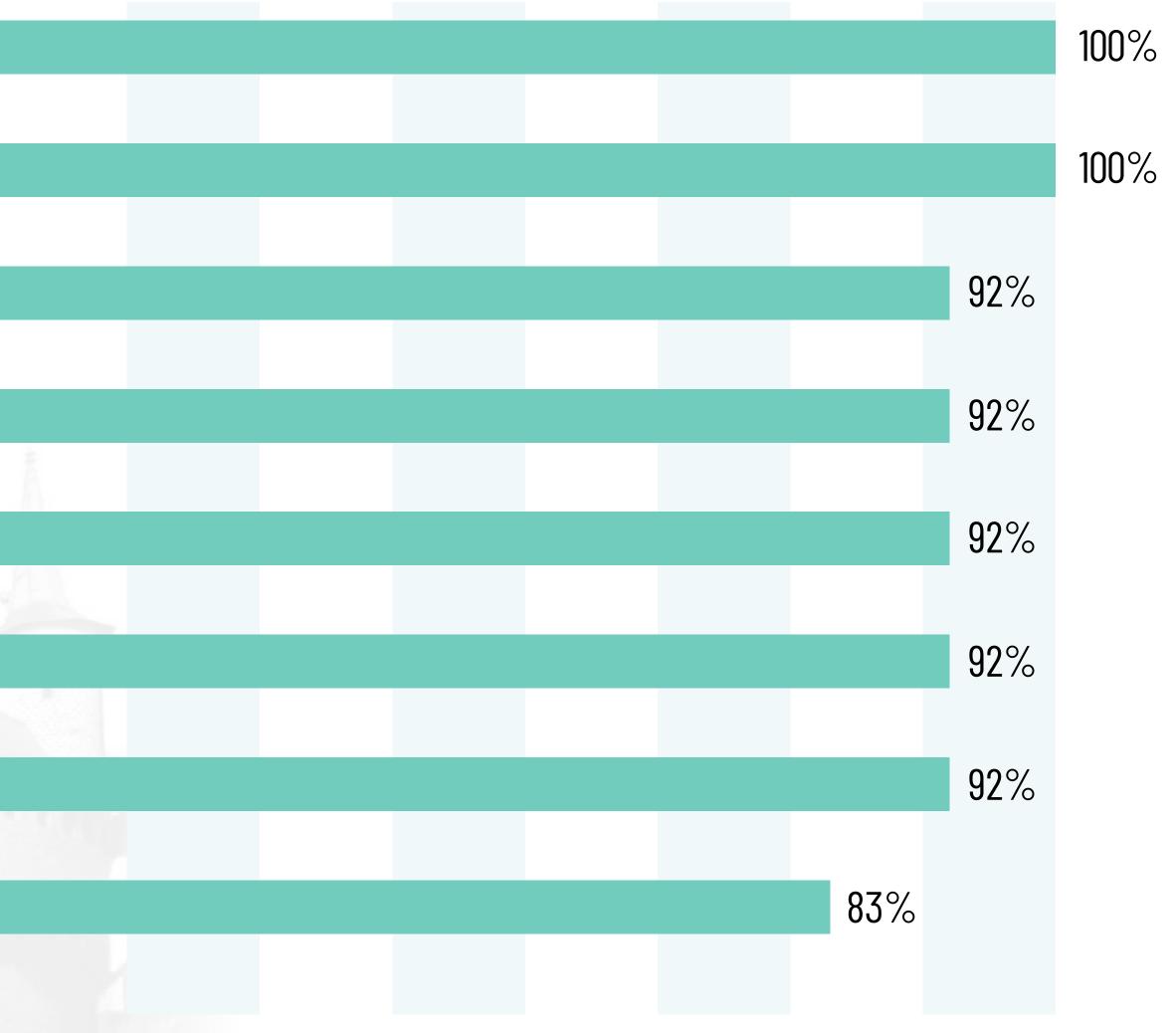
IT Project Management

Software and system testing

Cyber Security architecture design and development

Cloud Services implementation support





24

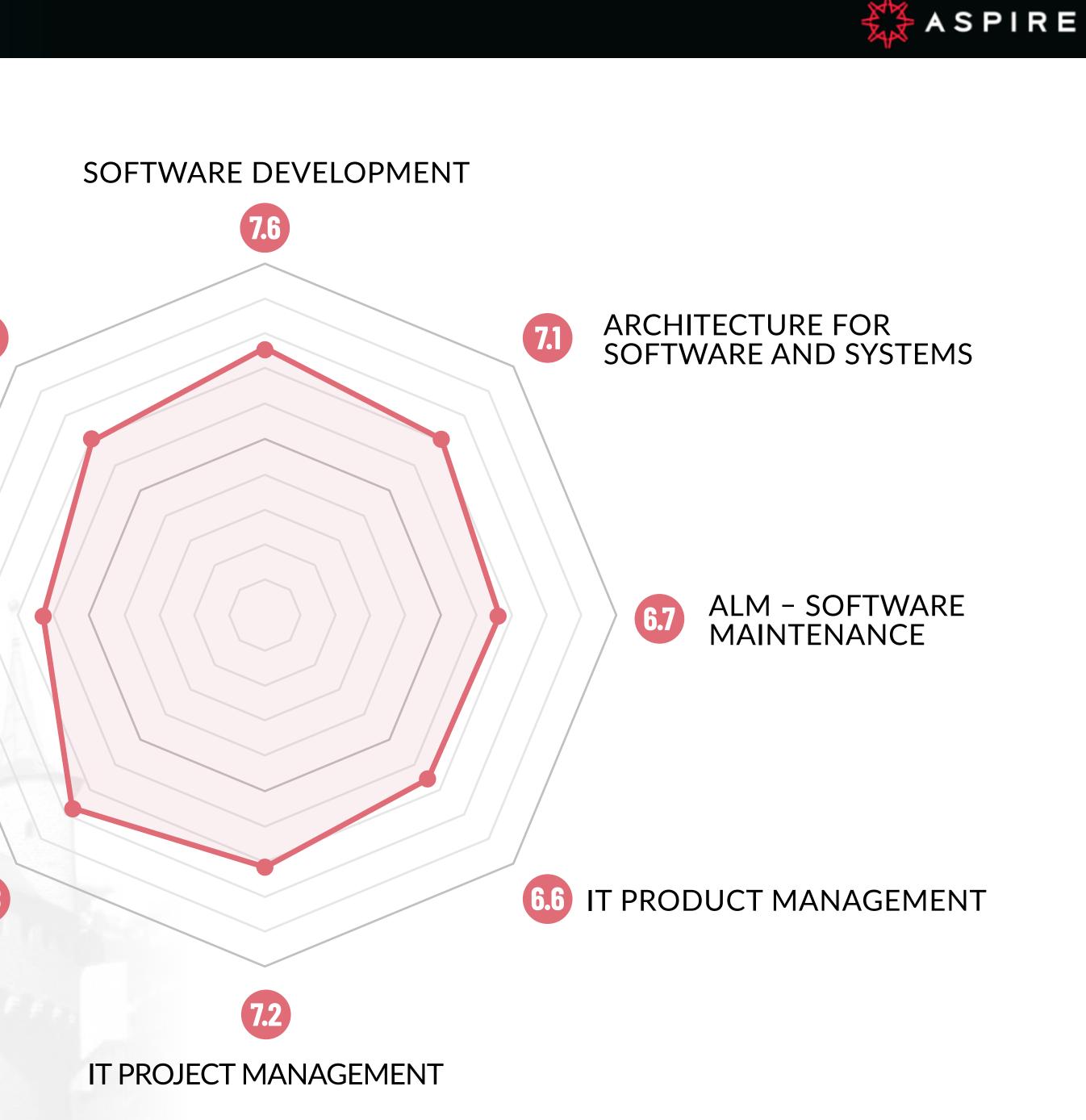
MATURITY OF SERVICE DELIVERY LINES

CLOUD SERVICES IMPLEMENTATION SUPPORT 7.0

CYBER SECURITY ARCHITECTURE DESIGN AND DEVELOPMENT 6.3

SOFTWARE AND SYSTEM TESTING 7.8





25



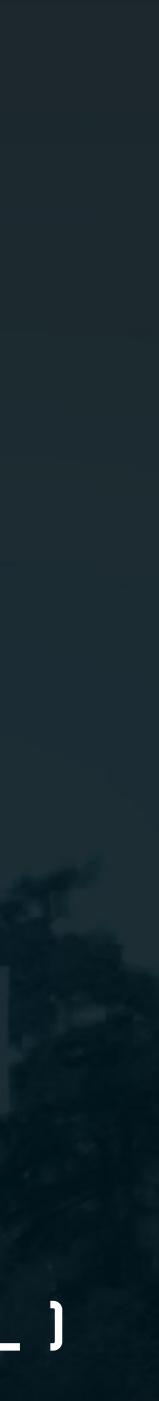


COMPANIES DELIVERING IT DESIGN & DEVELOPMENT SERVICES





IT (INTERNAL)



SERVICE DELIVERY LINES % centres delivering a given service line

IT support services 1st 2nd & 3rd line including patches

IT Infrastructure Management

Applications change and access management

IT vendor Relationship Management

IT Applications development and testing

Cloud Services admin support

Cyber Security strategy and operations











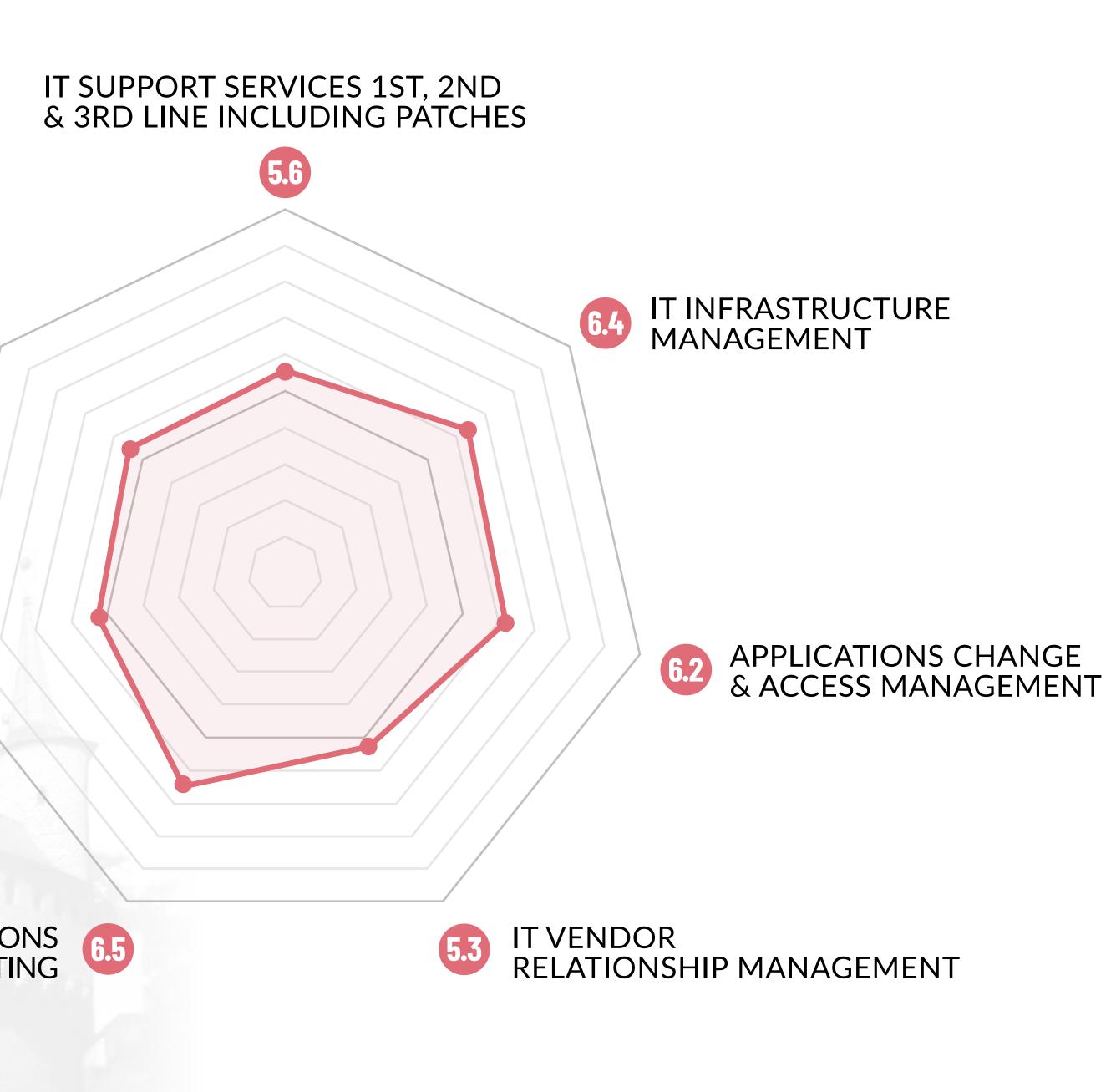
MATURITY OF SERVICE DELIVERY LINES

CLOUD SERVICES

CYBER SECURITY STRATEGY & OPERATIONS

IT APPLICATIONS DEVELOPMENT & TESTING

5.5

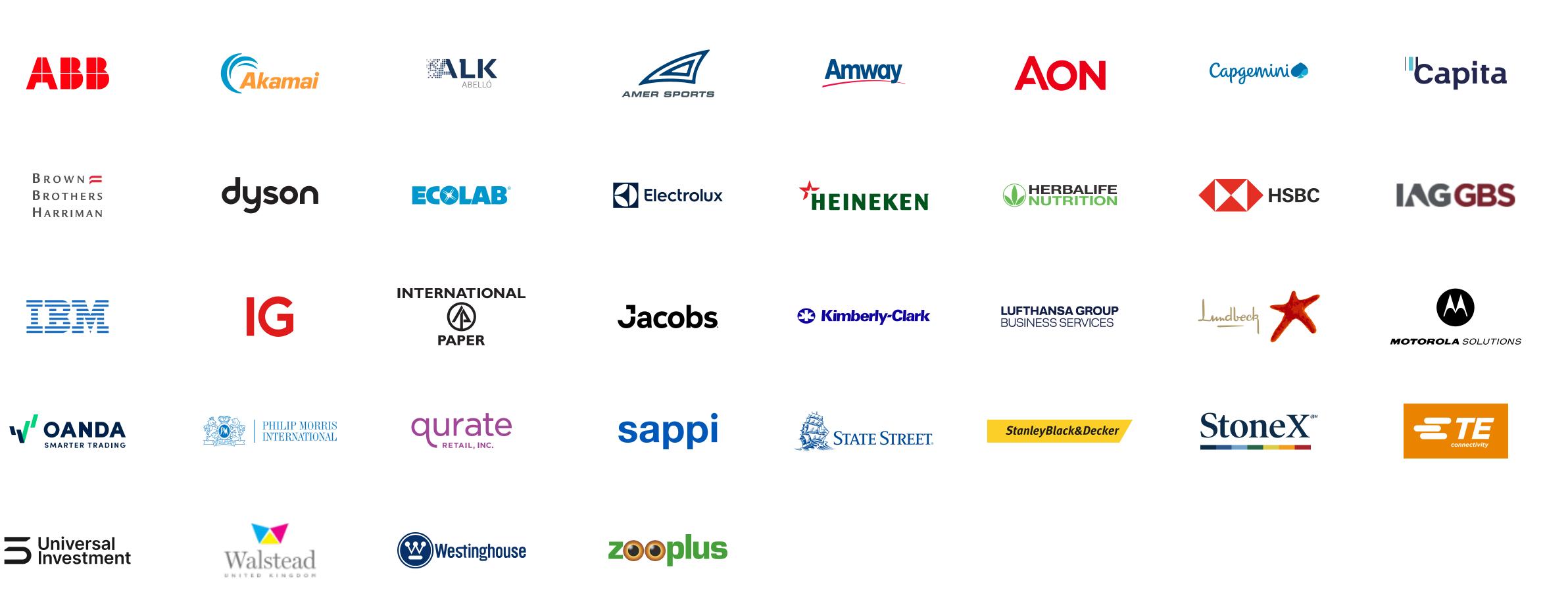




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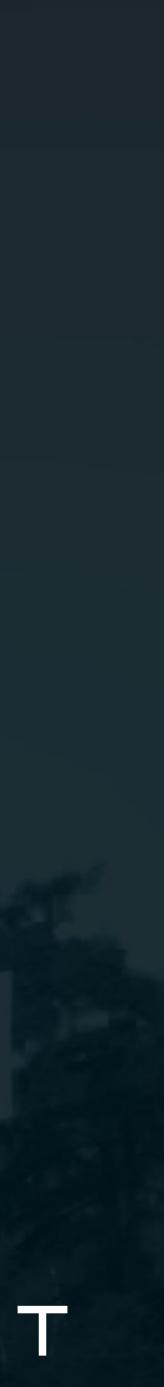
COMPANIES WITH INTERNAL IT SERVICES







PROCUREMENT



SERVICE DELIVERY LINES

% centres delivering a given service line

Category Management

Supplier Relationship Management

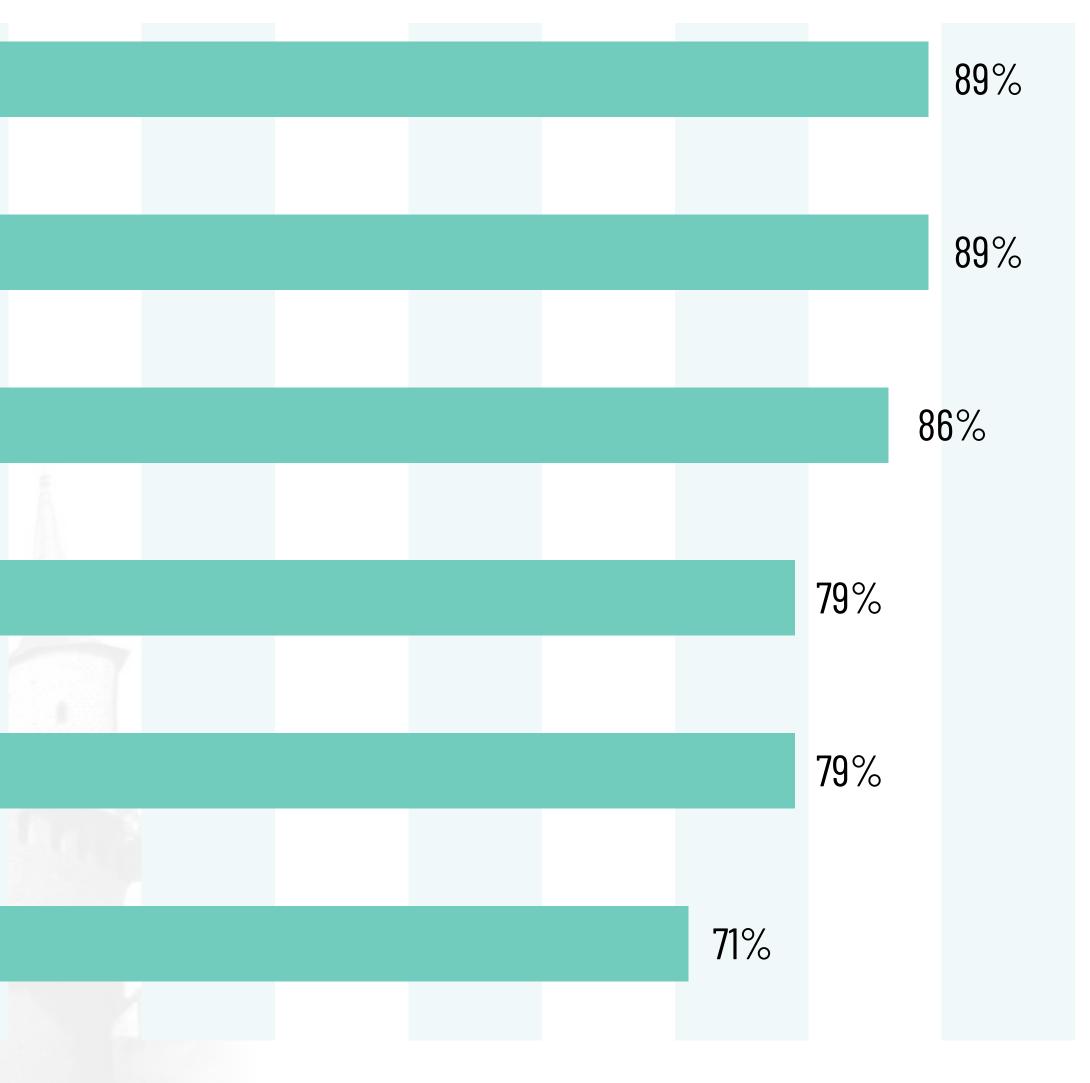
Contracting

Strategic Sourcing

Cost Management

Maintenance and development of Procurement systems





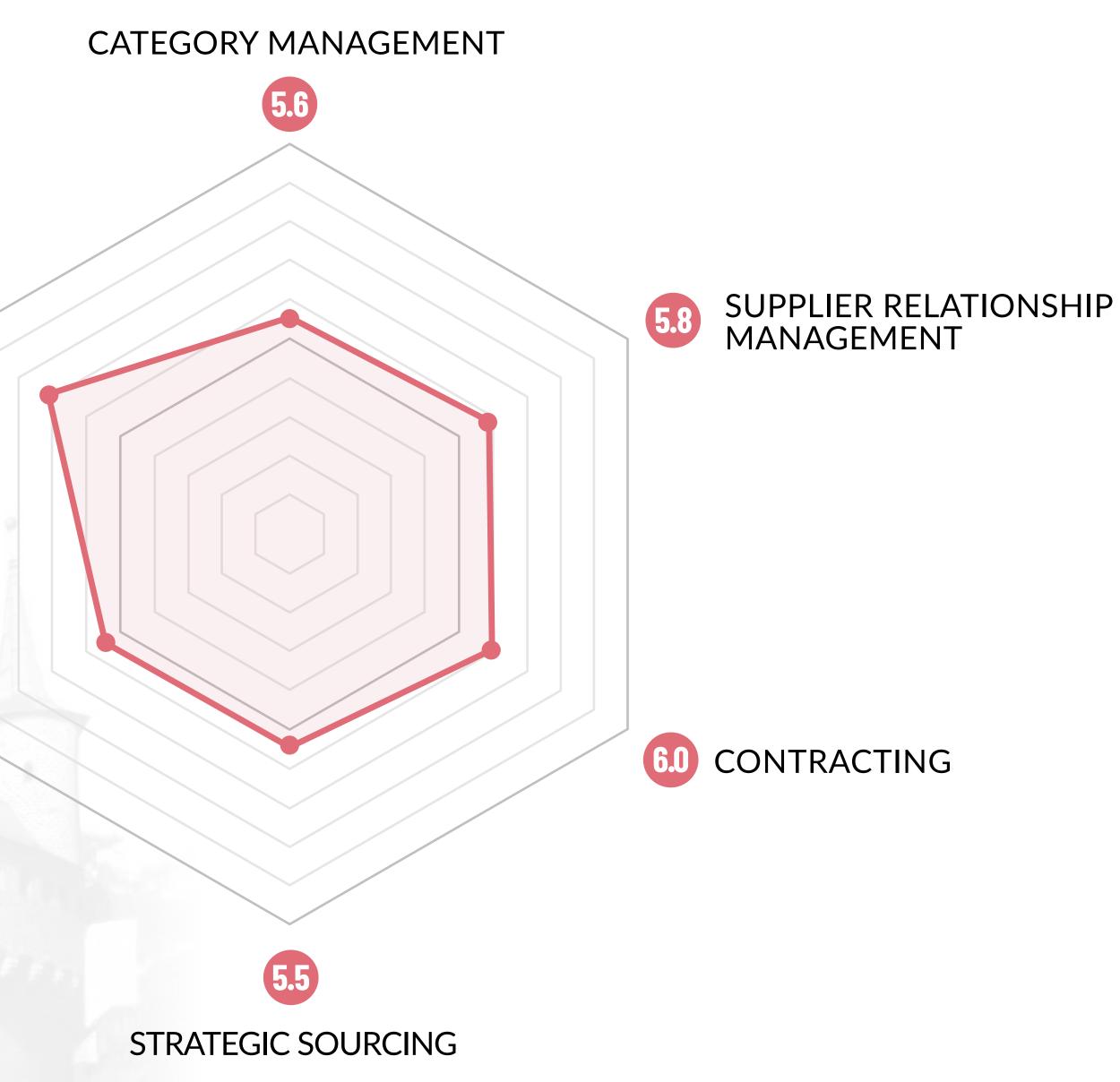


MATURITY OF SERVICE DELIVERY LINES

MAINTENANCE AND DEVELOPMENT OF PROCUREMENT SYSTEMS

COST MANAGEMENT 5.5





































COMPANIES DELIVERING PROCUREMENT SERVICES

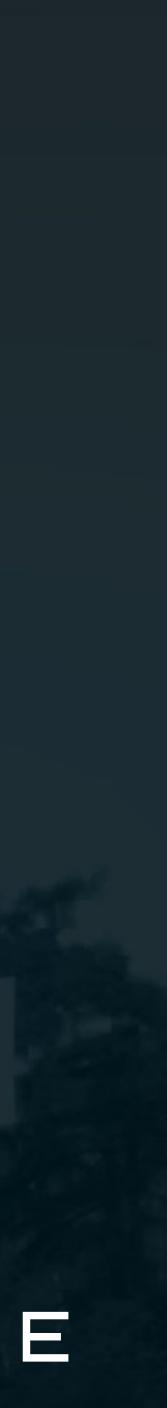








CUSTOMER SERVICE



SERVICE DELIVERY LINES

% centres delivering a given service line

Customer Services Desk

Complaints and Returns Management

Customer Retention

Sales & Marketing





100%



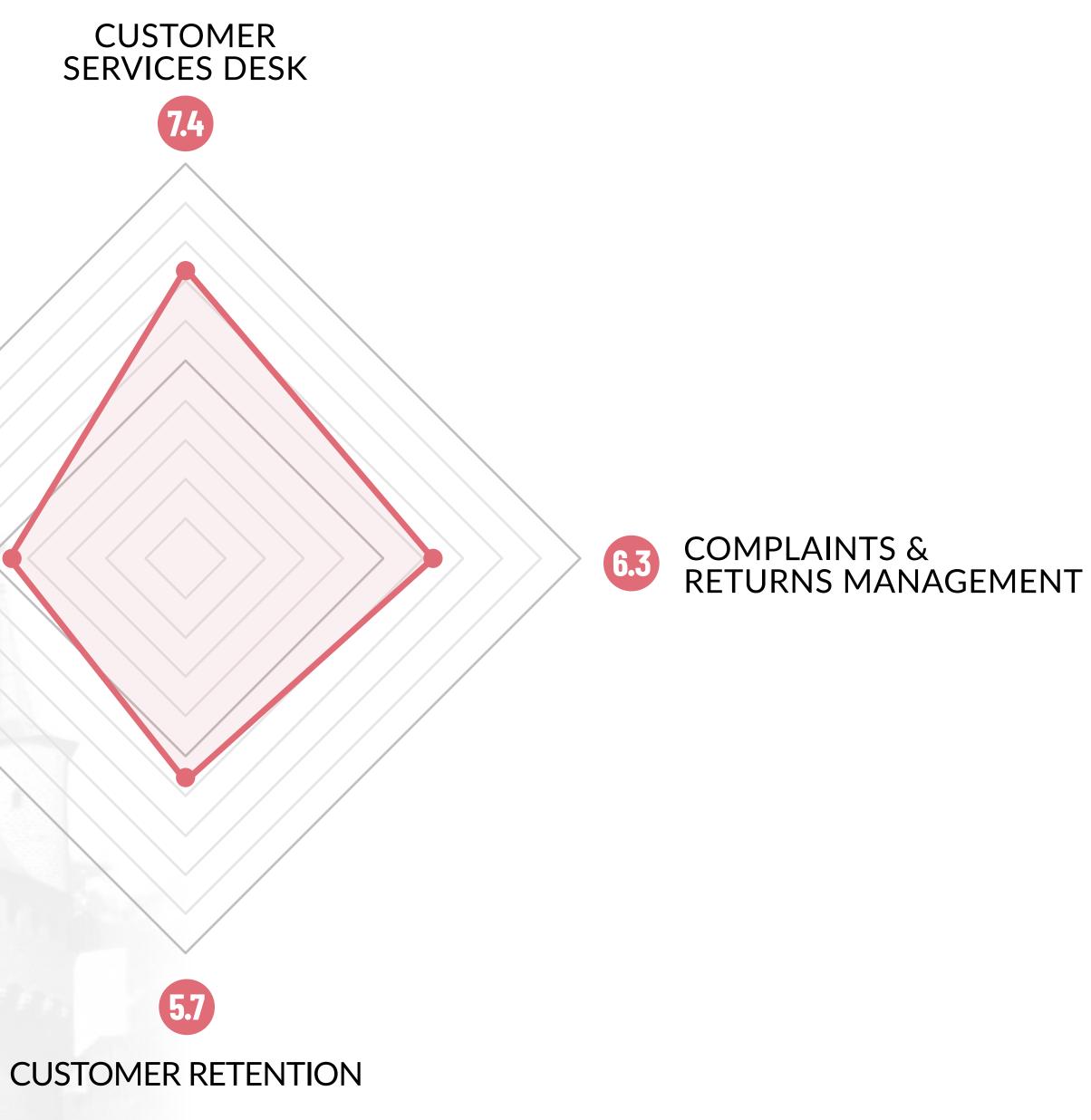




MATURITY OF SERVICE DELIVERY LINES

SALES & MARKETING 4.5











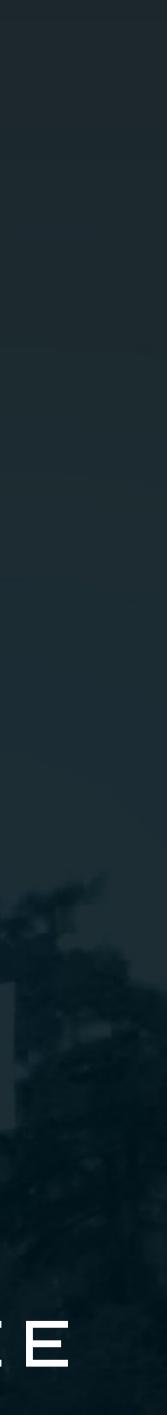
COMPANIES DELIVERING CUSTOMER SERVICE SERVICES







FINANCIAL SERVICES & INSURANCE



SERVICE DELIVERY LINES % centres delivering a given service line

Banking Operations

Compliance including KYC and AML

Fund Management and Accounting

Credit Risk Analysis and Management

Valuations

Market Risk Analysis and Management

Regulatory Reporting for financial services

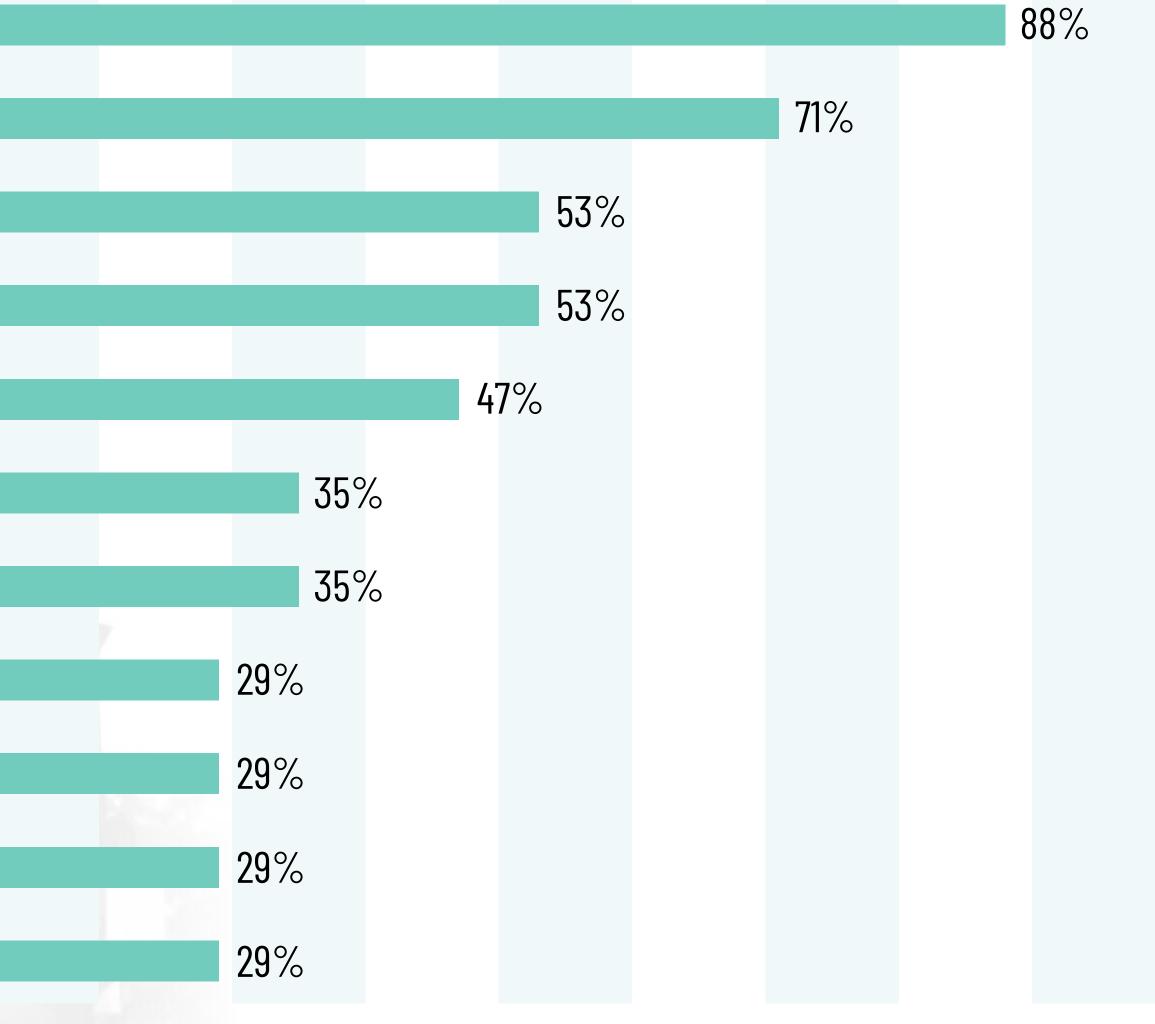
Derivatives

Product Control & profitability reporting for financial services

Investment Management Services

Financial Products/Solutions development and management







MATURITY OF SERVICE DELIVERY LINES

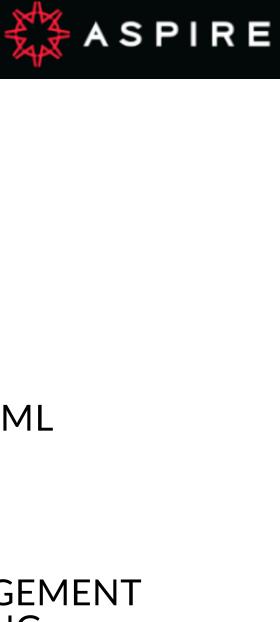
FINANCIAL PRODUCTS/SOLUTIONS DEVELOPMENT & MANAGEMENT



PRODUCT CONTROL & PROFITABILITY REPORTING FOR FINANCIAL SERVICES



REGULATORY REPORTING 60 FOR FINANCIAL SERVICES













dyson







StanleyBlack&Decker



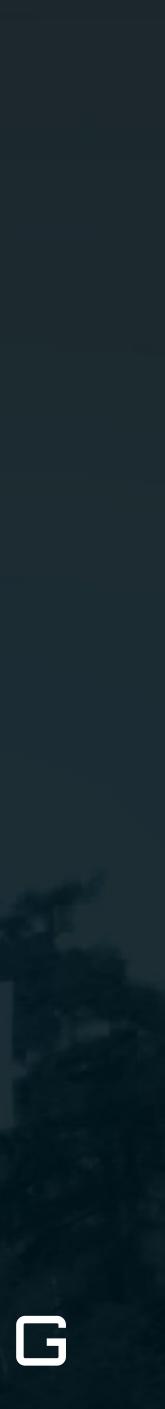
COMPANIES DELIVERING FINANCIAL SERVICES & INSURANCE





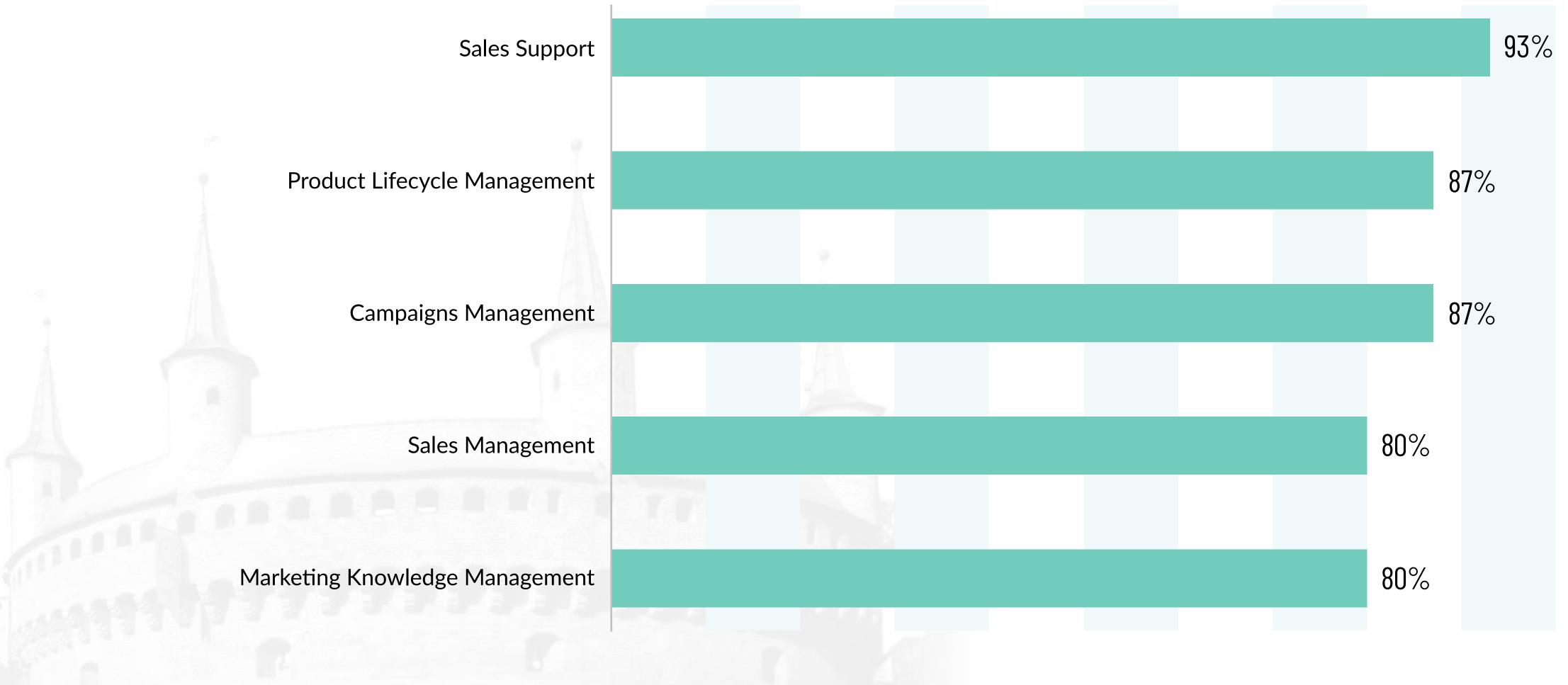


SALES & MARKETING



SERVICE DELIVERY LINES

% centres delivering a given service line





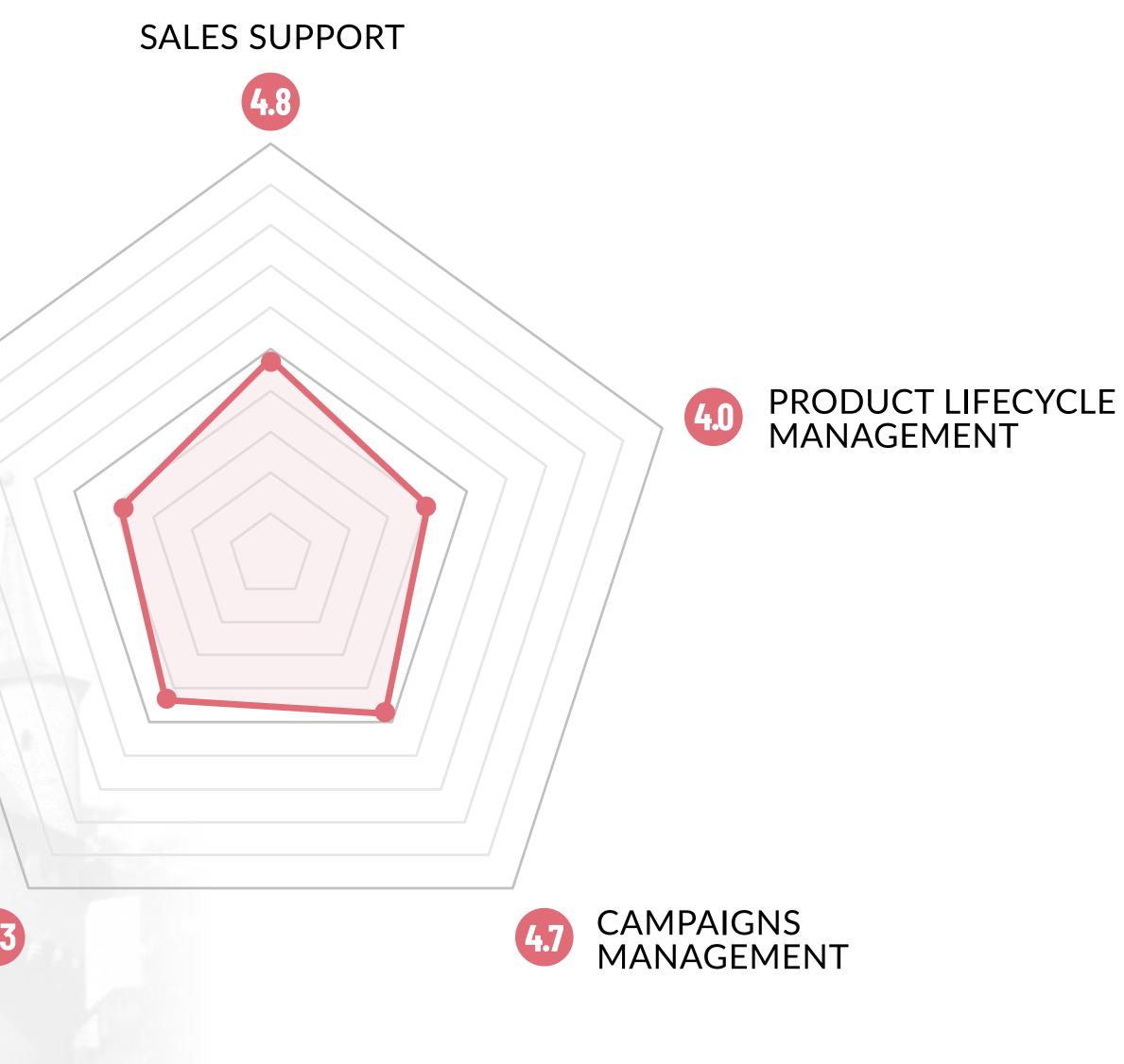
44

MATURITY OF SERVICE DELIVERY LINES

MARKETING KNOWLEDGE 38 MANAGEMENT







45















COMPANIES DELIVERING SALES & MARKETING SERVICES





















Many thanks to our member companies who contributed data and opinion to the survey.

Our thanks to the PwC Business Services Advisory Centre of Excellence for their support in developing the Process Tracker survey.



ACKNOWLEDGEMENTS



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48