



PROCESS TRACKER 2024



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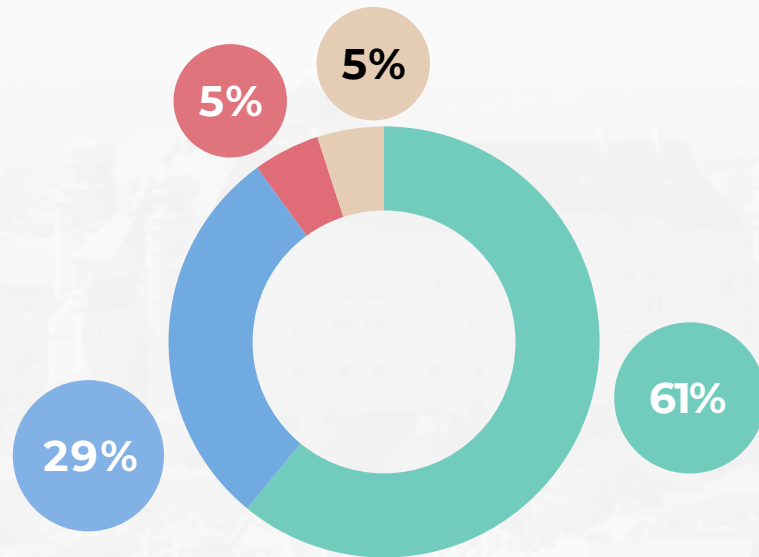
Controlling

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Bridging Industries: Insights and Innovations from 56 Organisations

From a range of industries covering IT, Retail, Banking, Chemicals and more

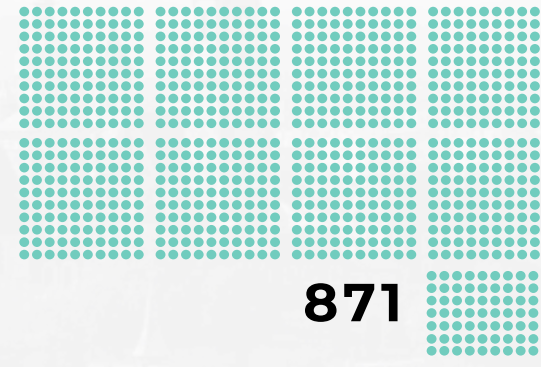
Types of centres



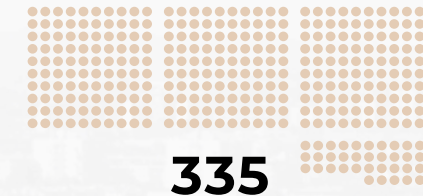
- Multi-Functional Centers
- Single Tower: IT Design & Development
- Single Tower: Other Delivery Lines
- Single Tower: Finance

Average centre size according to the type

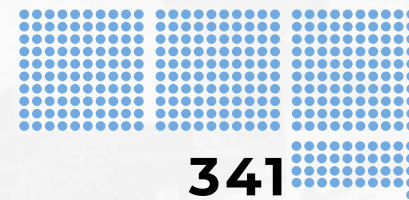
Multi-functional centres



Single tower: Finance



Single tower: IT design & Development

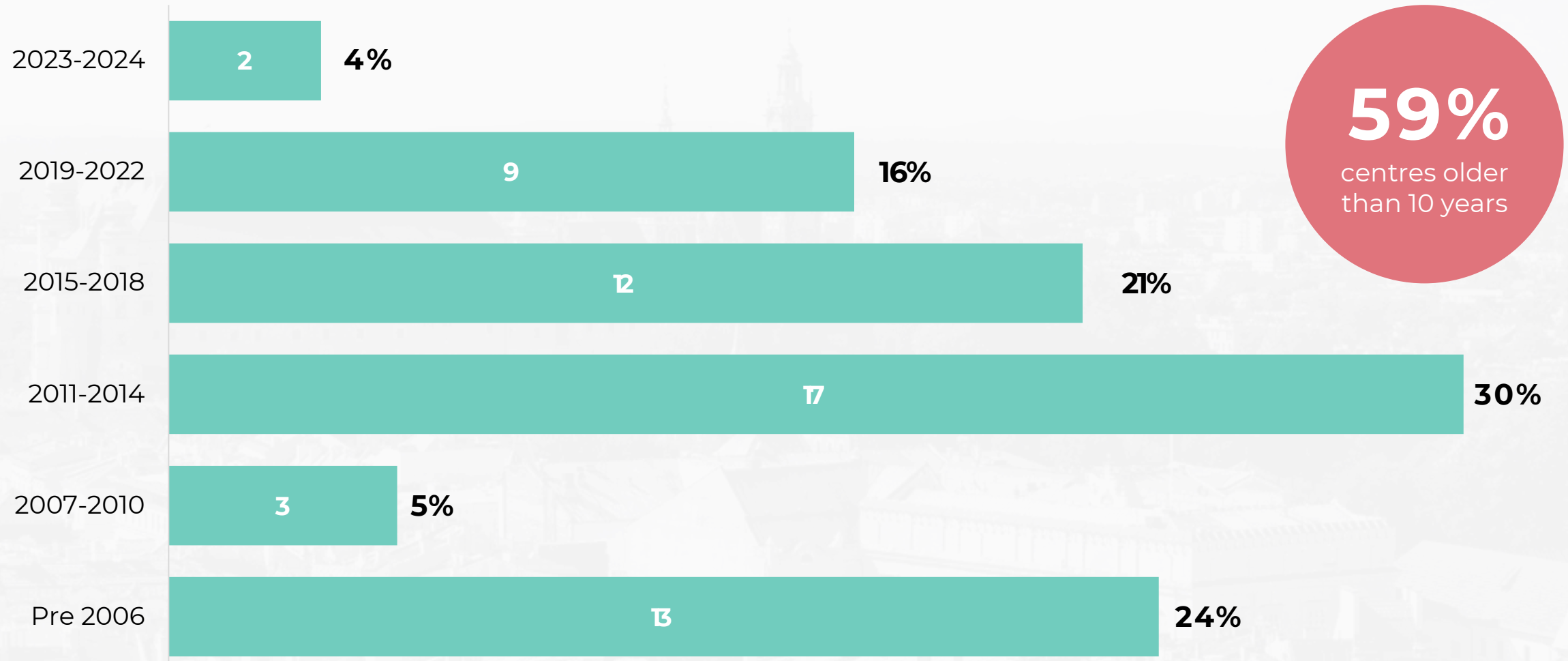


Single tower: Other delivery lines



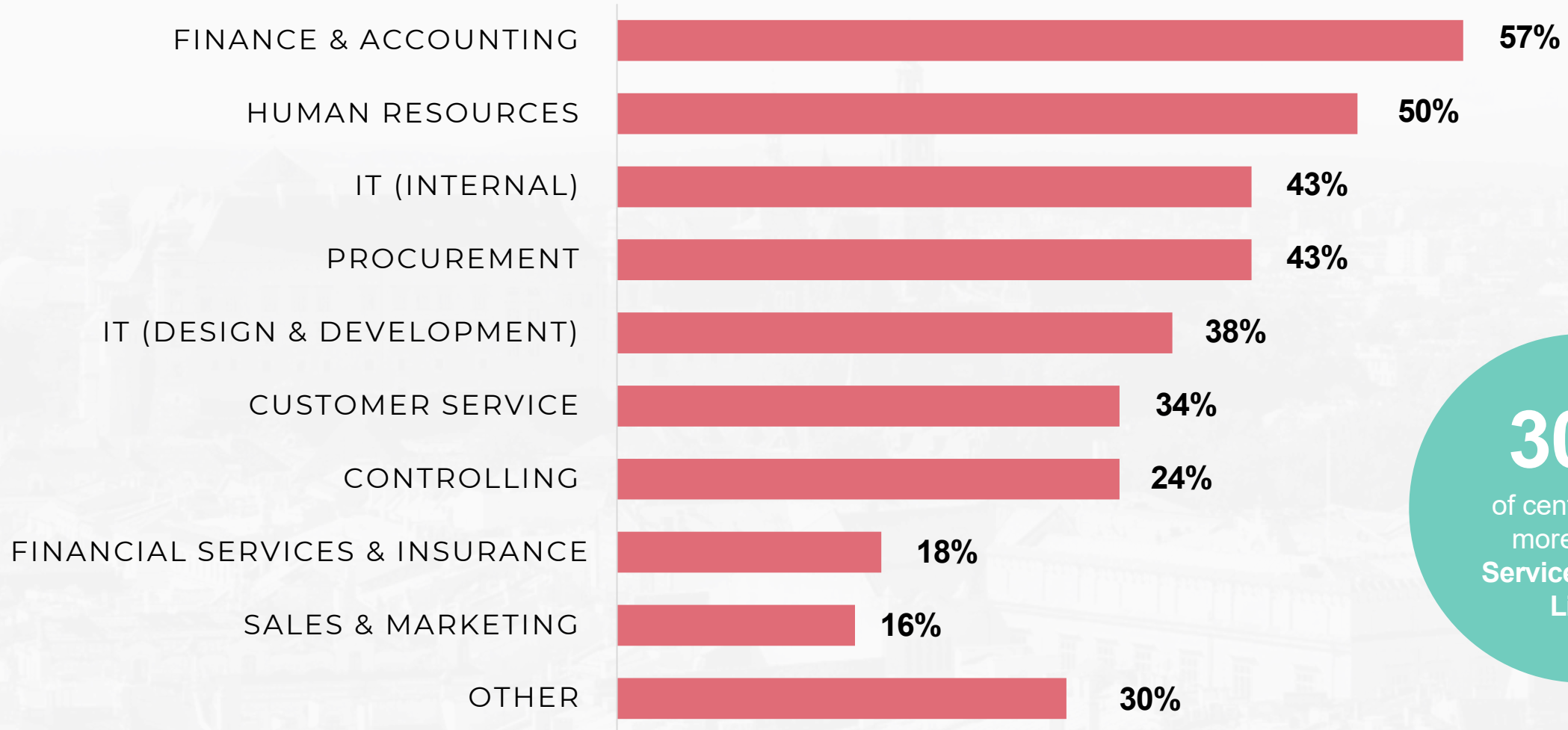
A balanced mix of fresh and mature centres participated in the survey

When was your centre established?



Finance & Accounting, Human Resources and internal IT remain the most popular

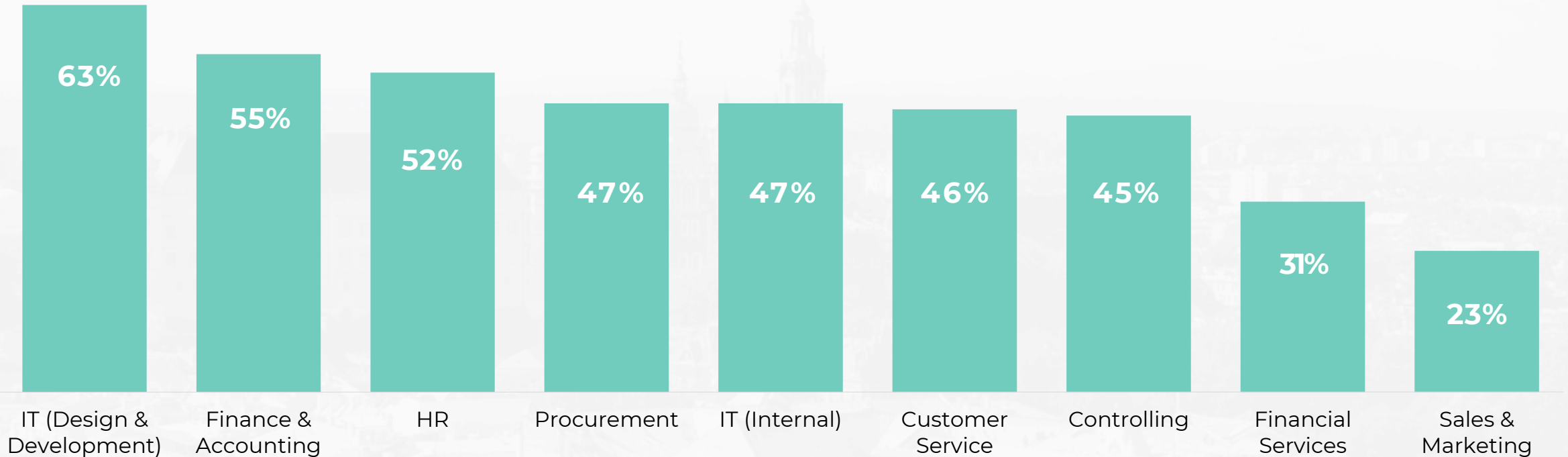
Service Delivery Lines: % of centres delivering a given service line



30%
of centres have more than 5 Service Delivery Lines

IT Development, Finance and HR are centralised to the largest extent

Service Delivery Lines – what is the level of concentration?

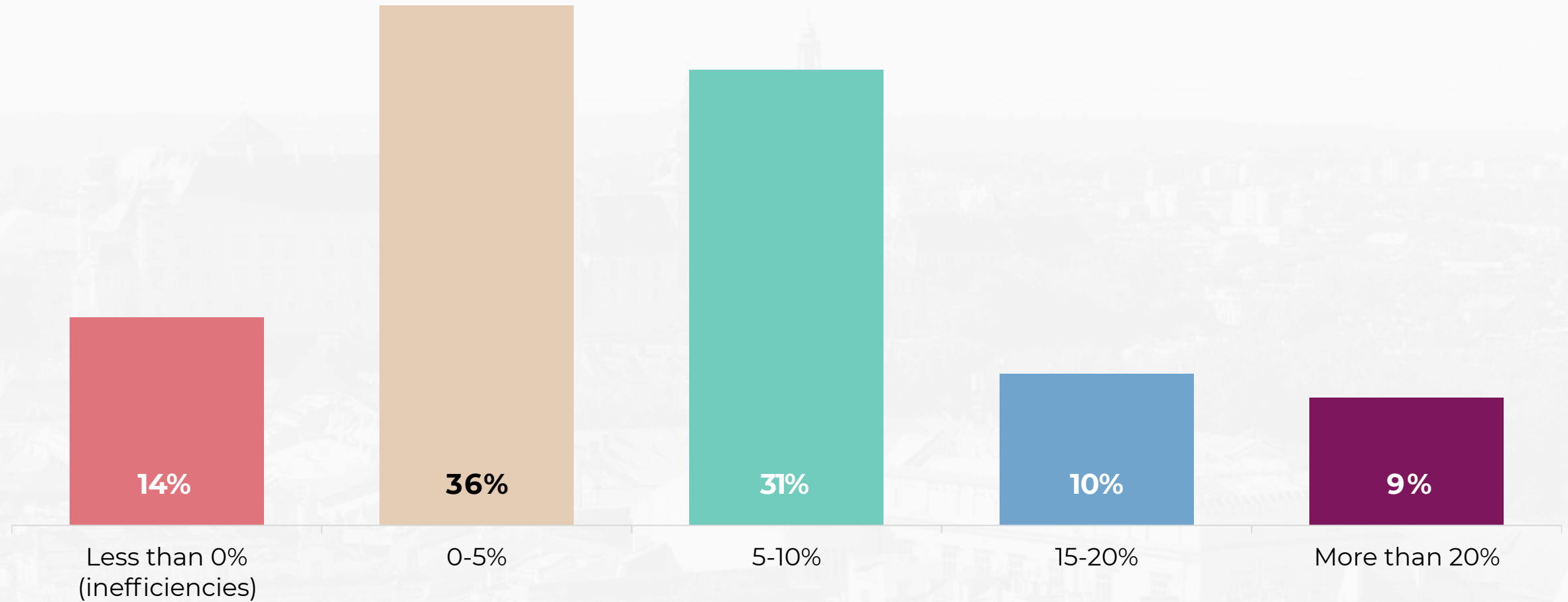


Concentration Index

Where: **0%** - Service not provided **10%-20%** - Service provided to a very limited extent or only oversight of a 3rd party provider for the service, **30%-50%** - Transition and consolidation of some processes, **50%-90%** - Considerable to full migration of all processes, **100%** - Full ownership of the function (including management of any 3rd party outsourced functions and development of new processes and services)

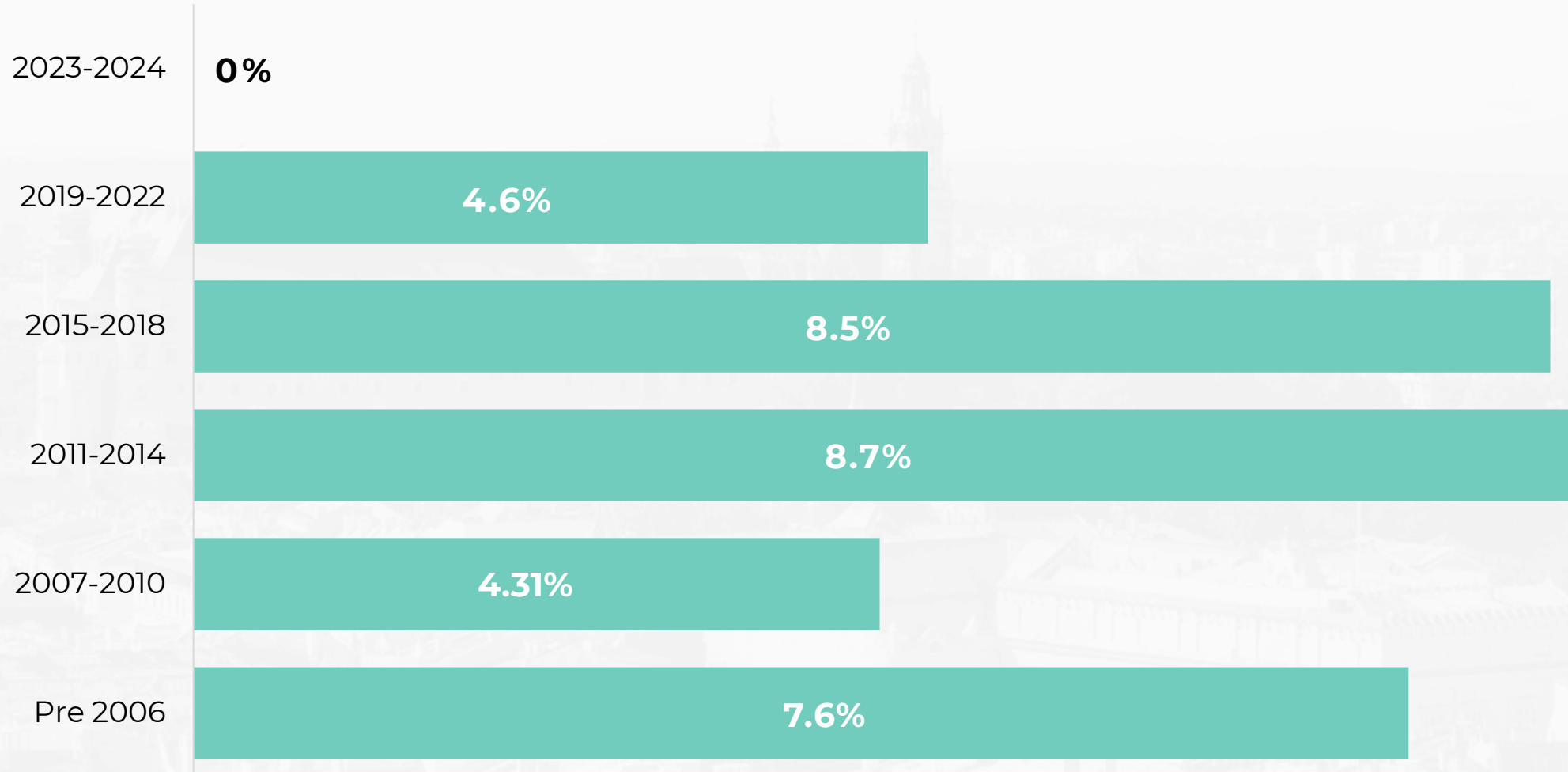
The average last year efficiency rate is approximately 7%

What is the efficiency rate? % of capacity release in last financial year



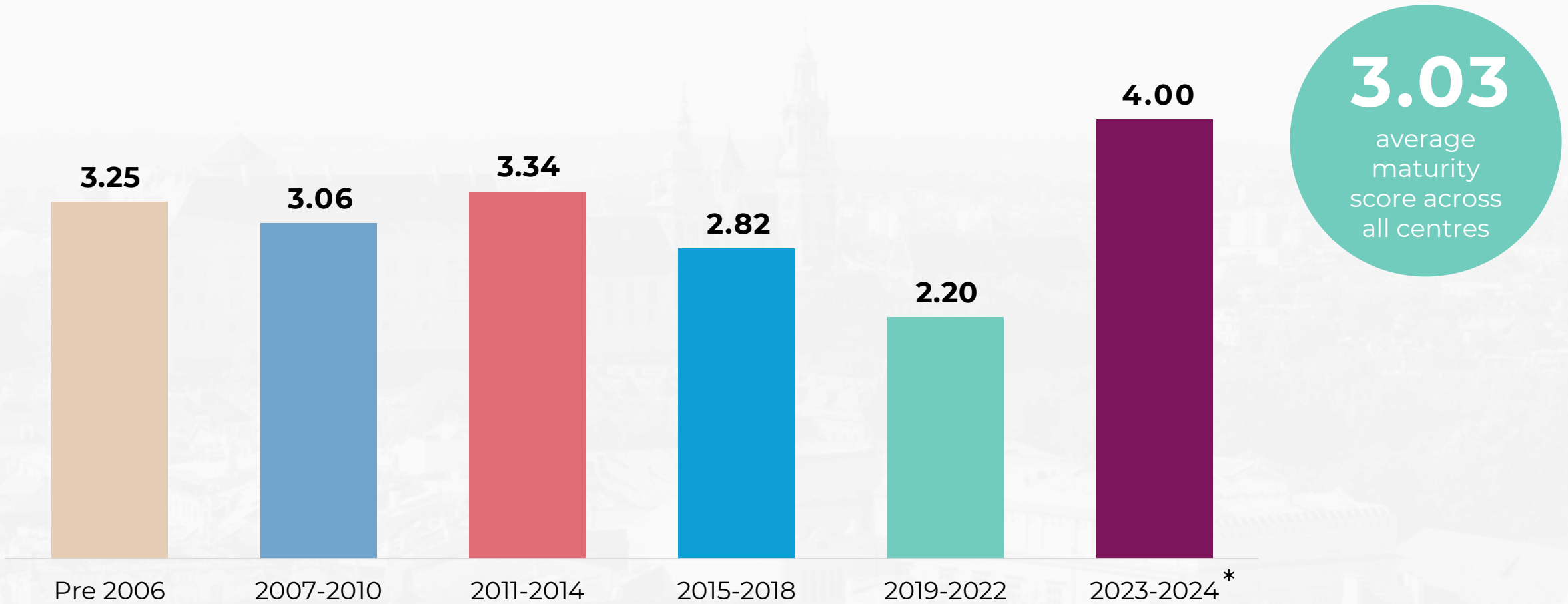
Efficiency release rates tend to grow with the maturity of centers

What is the efficiency rate? % of capacity release in last financial year



Maturity scores across centers generally follow a trend of growth over time

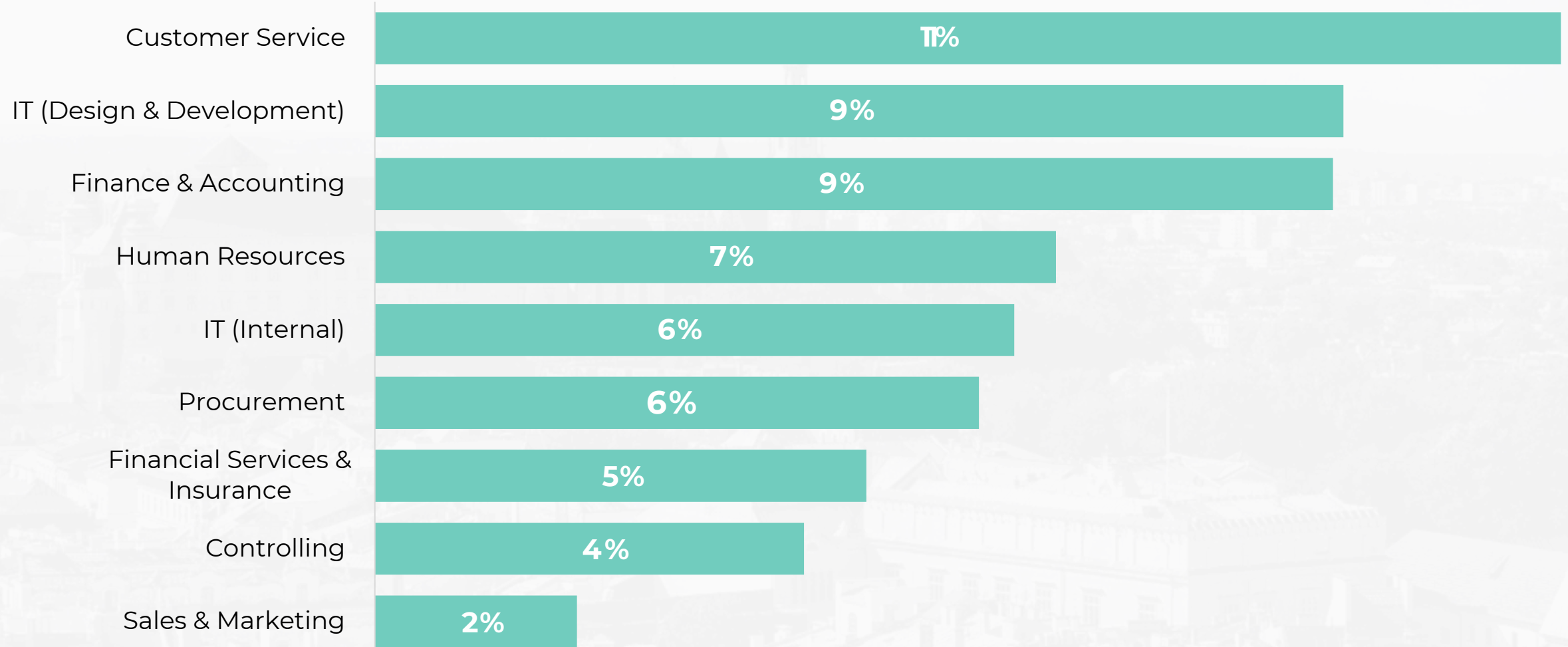
Maturity of centre per date of centre establishment



*small sample size

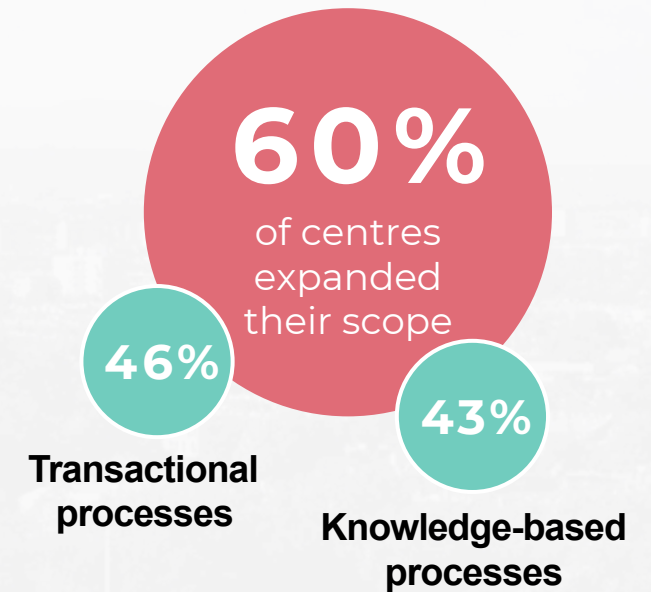
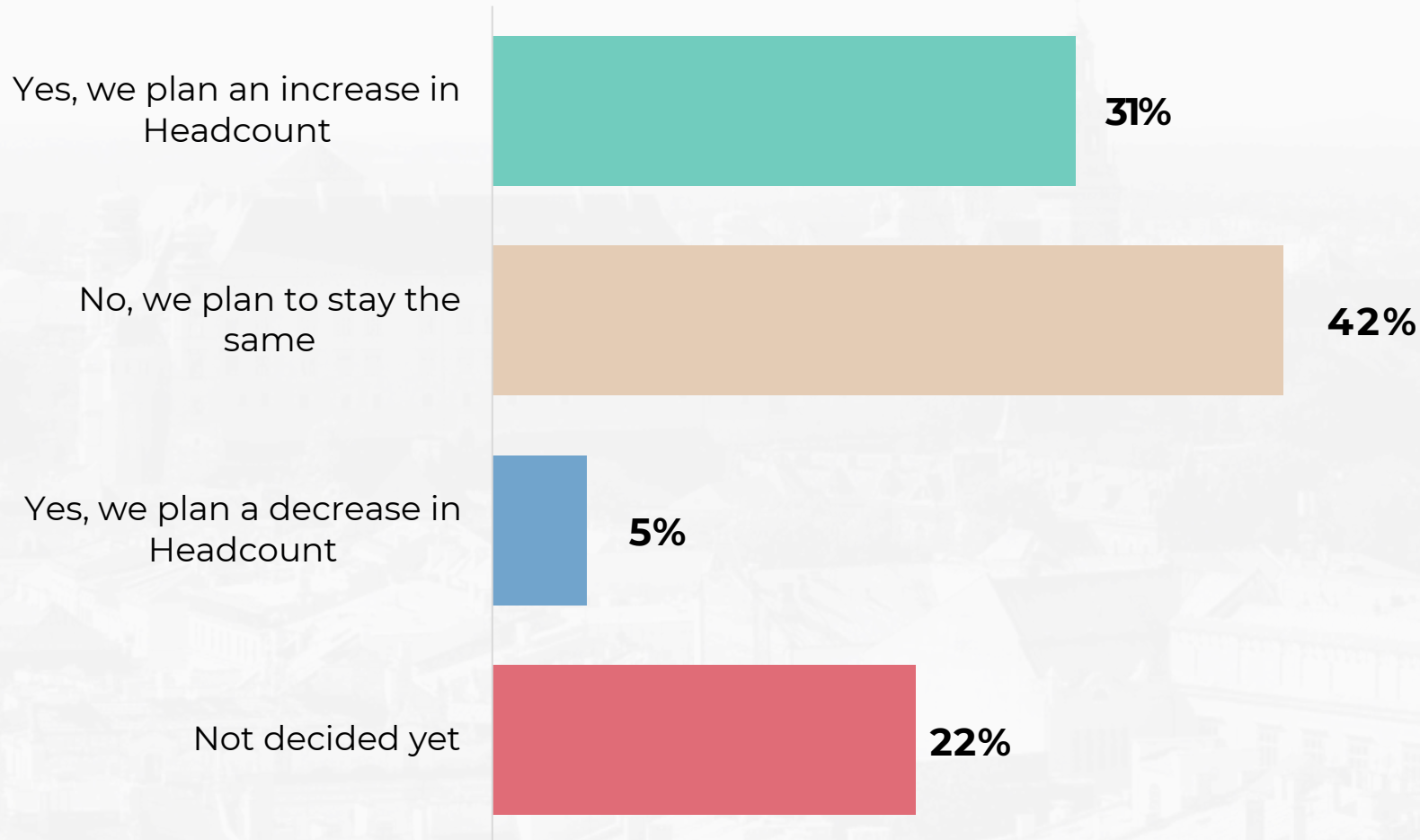
Customer Service achieved the highest efficiency release rate last year at 11%

What is the efficiency rate? % of capacity release in last financial year



The Krakow Centres' market remains stable, enabling organisations to maintain their current headcount or to increase it slightly

Are you planning a change in Headcount in your Centre over the next 12 months?



Key conclusions

Continued market growth although slower and not in all services



Still driving value and efficiency gains

Centres of Excellence as key enablers



Digital Transformation remains a challenge



ASPIRE & PwC
PROCESS TRACKER
2024

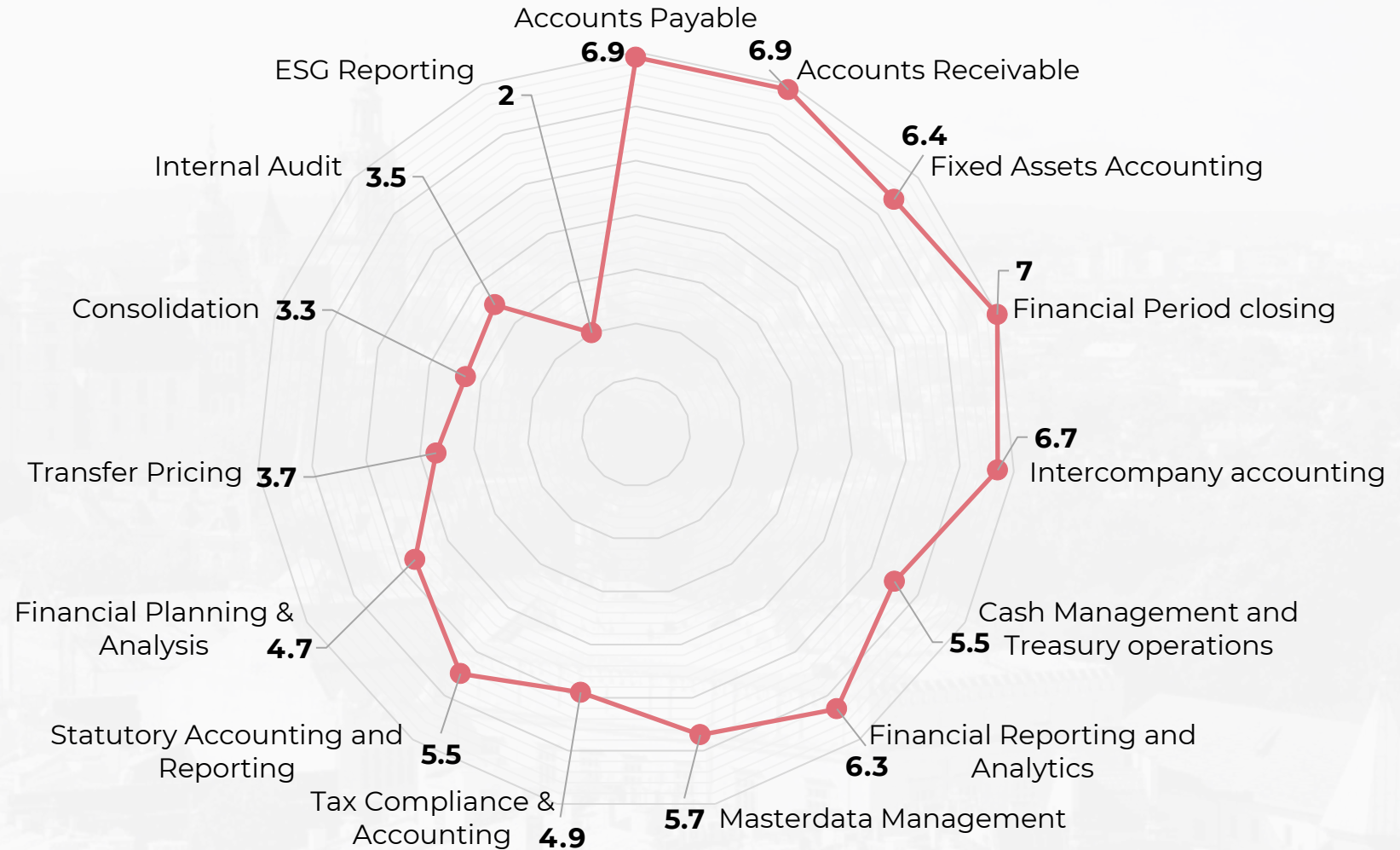
Deep dive into Service Pillars



Finance & Accounting

Service Delivery Lines

Level of concentration



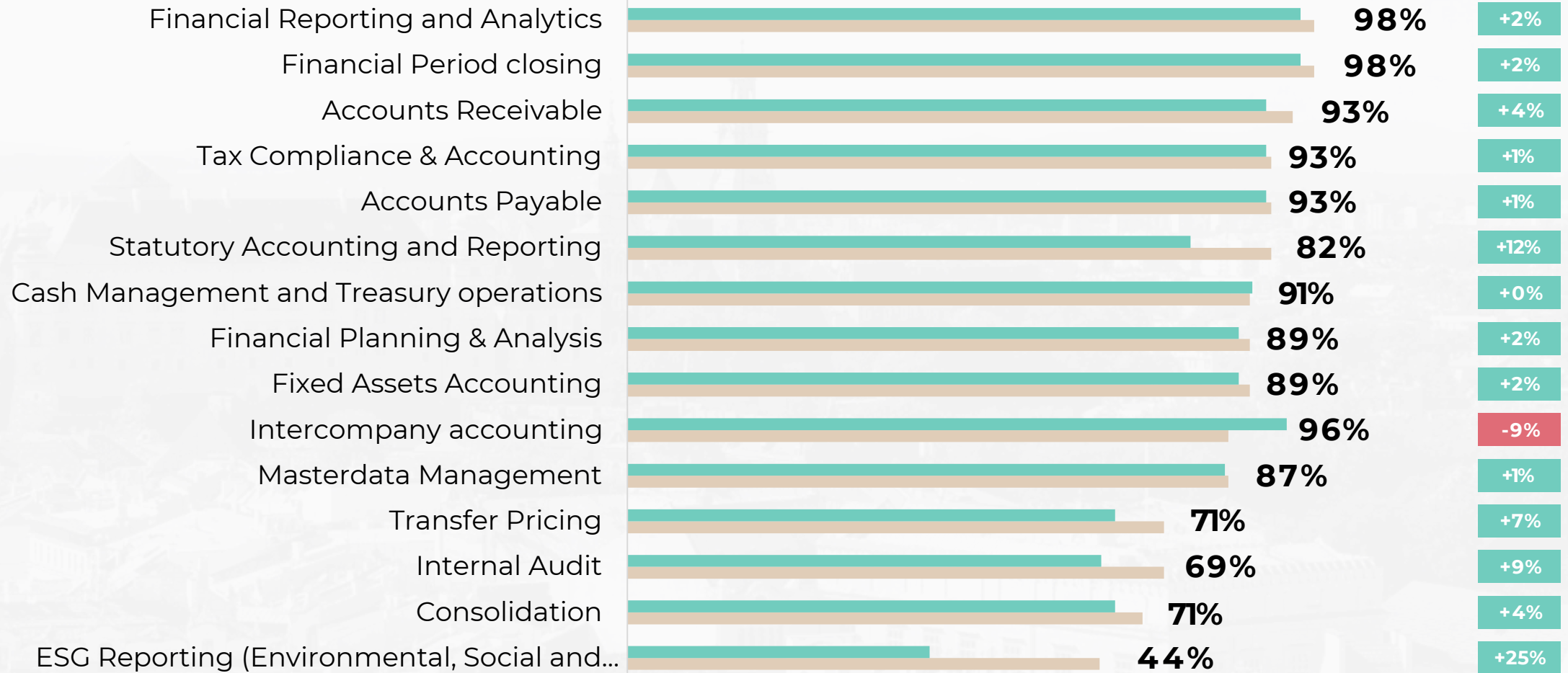
Concentration Index

Where:

- 0 - Service not provided
- 1-2 - Service provided to a very limited extent or only oversight of a 3rd party provider for the service
- 3-5 - Transition and consolidation of some processes
- 5-9 - Considerable to full migration of all processes.
- 10 - Full ownership of the function (including management of any 3rd party outsourced functions and development of new processes and services)

Finance & Accounting Services

% of centres delivering a given service line

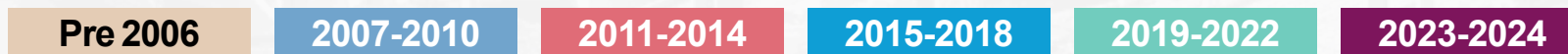
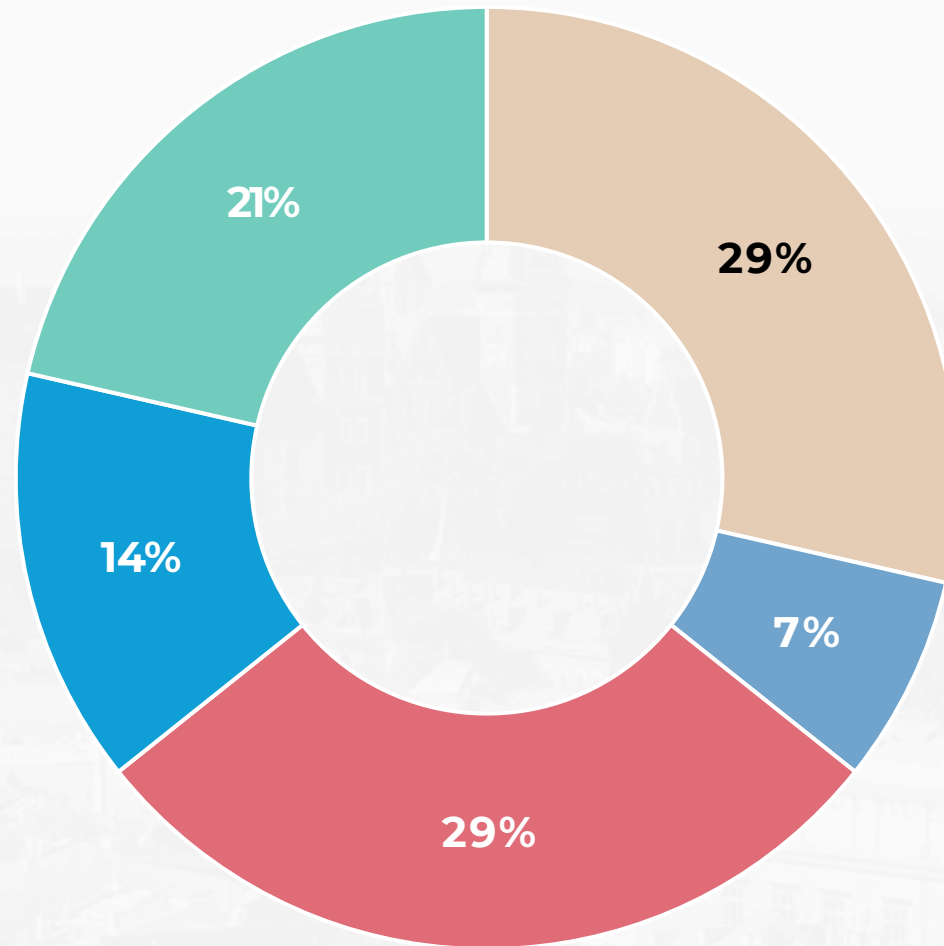


2022

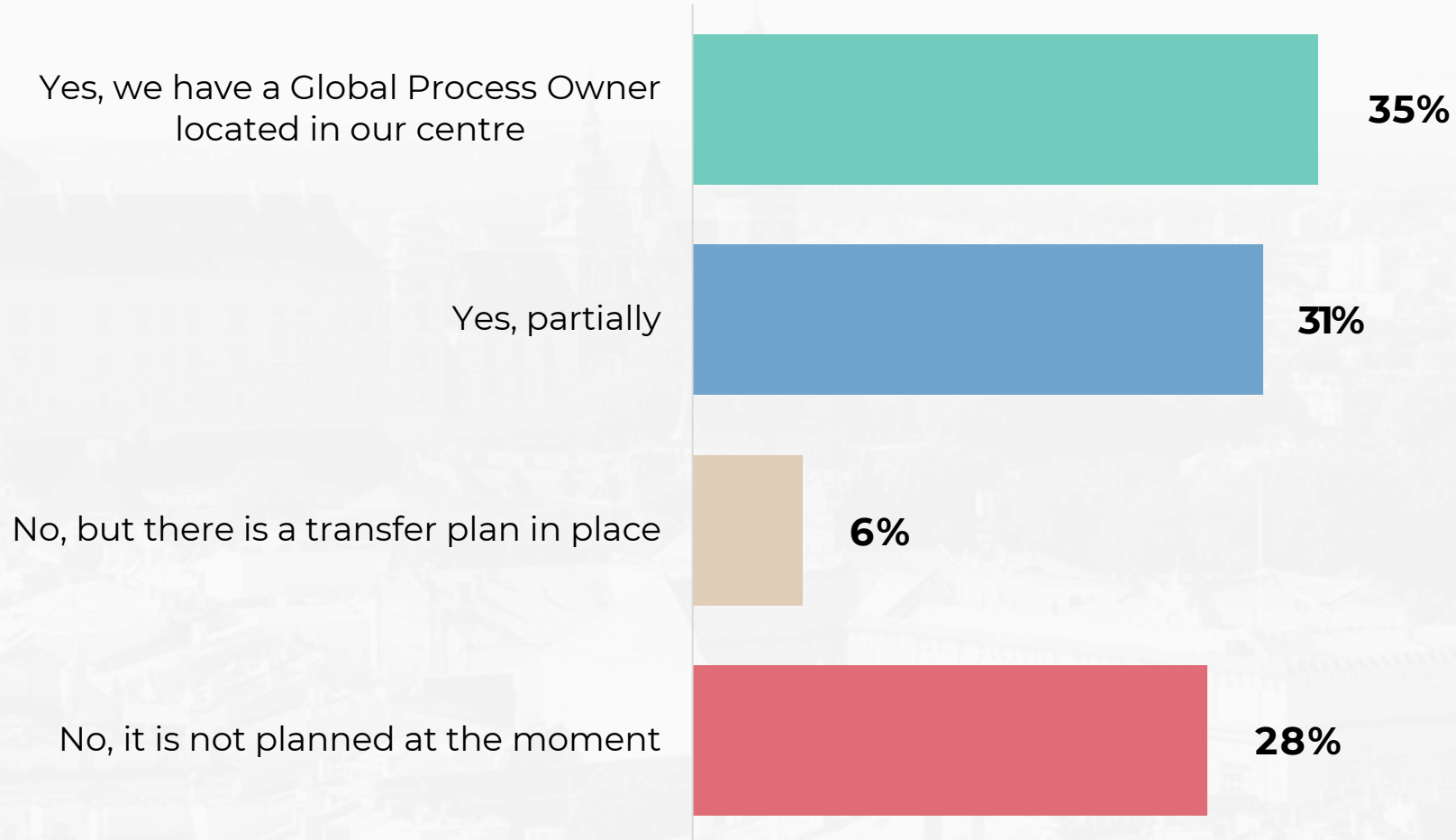
2024

Finance & Accounting Services

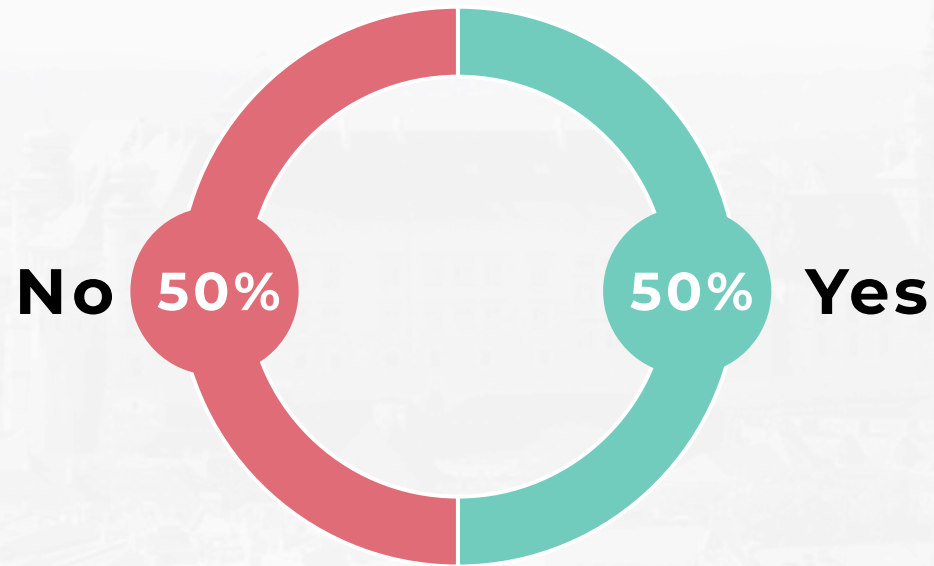
% of capacity release last financial year per date of centre establishment



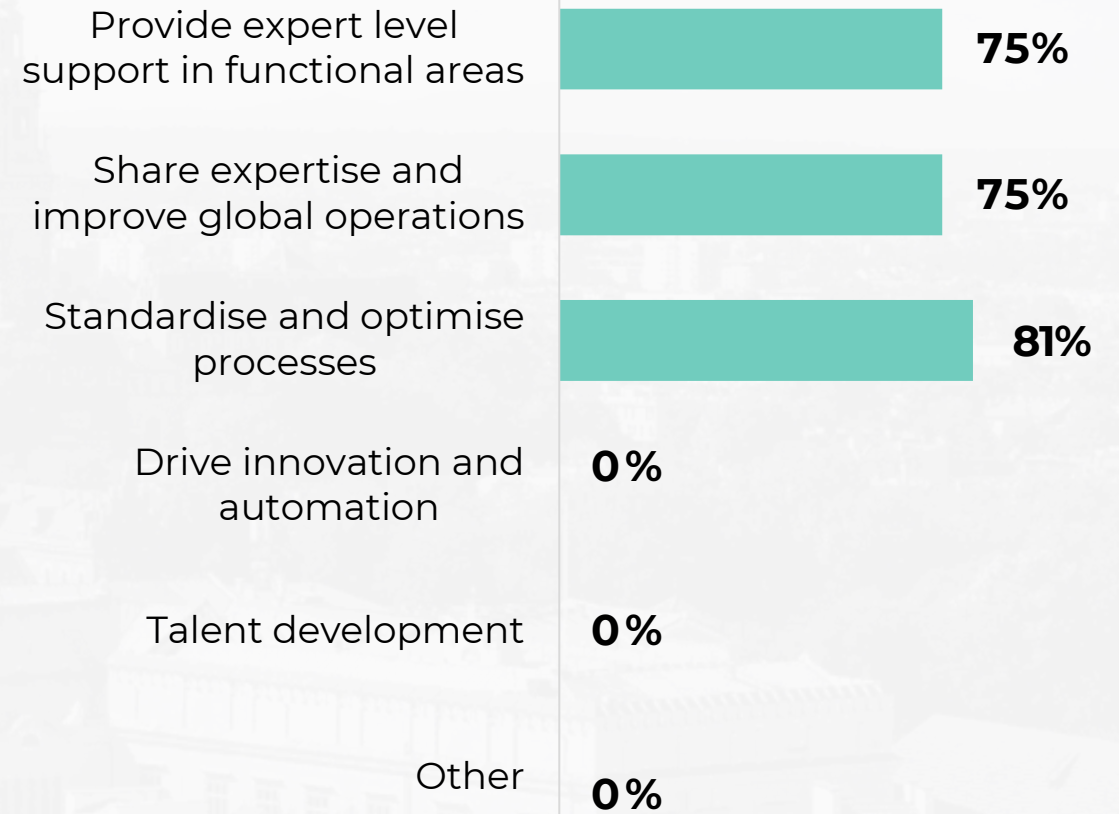
Is the role of the Global Process Owner located within your Finance & Accounting Services Delivery pillar?



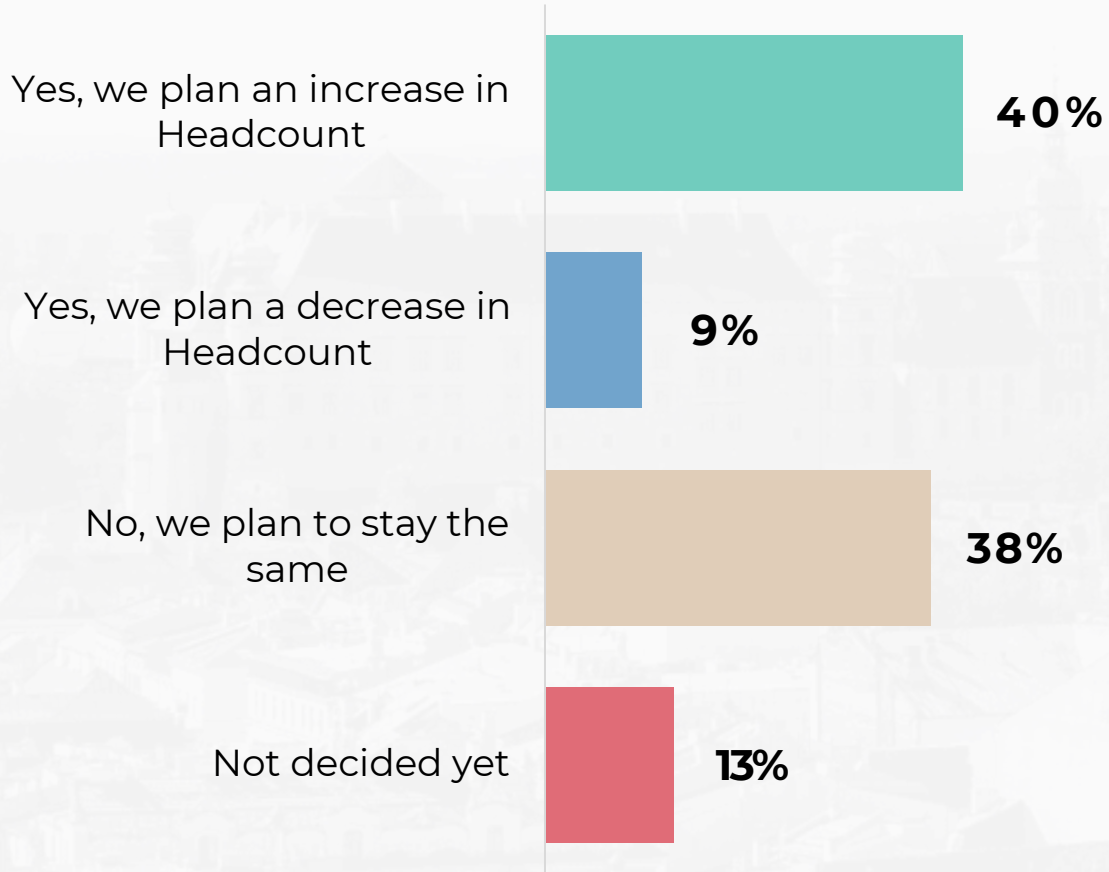
Do you **have a Centre of Excellence** in your Finance & Accounting Services Delivery pillar?



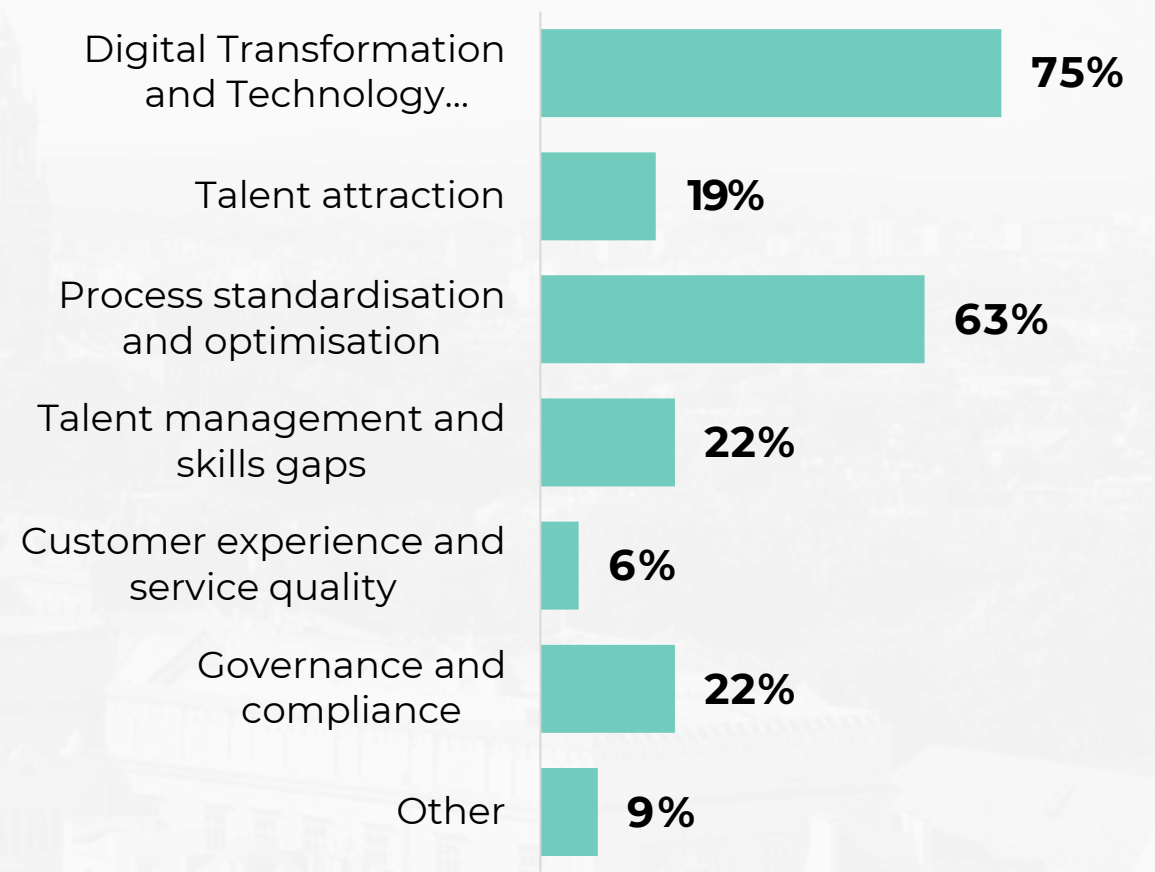
What is the **primary role** of the Centre of Excellence in your Finance & Accounting Services Delivery pillar?



Are you planning a **change in headcount** in your Finance & Accounting Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Finance & Accounting Services Delivery pillar?



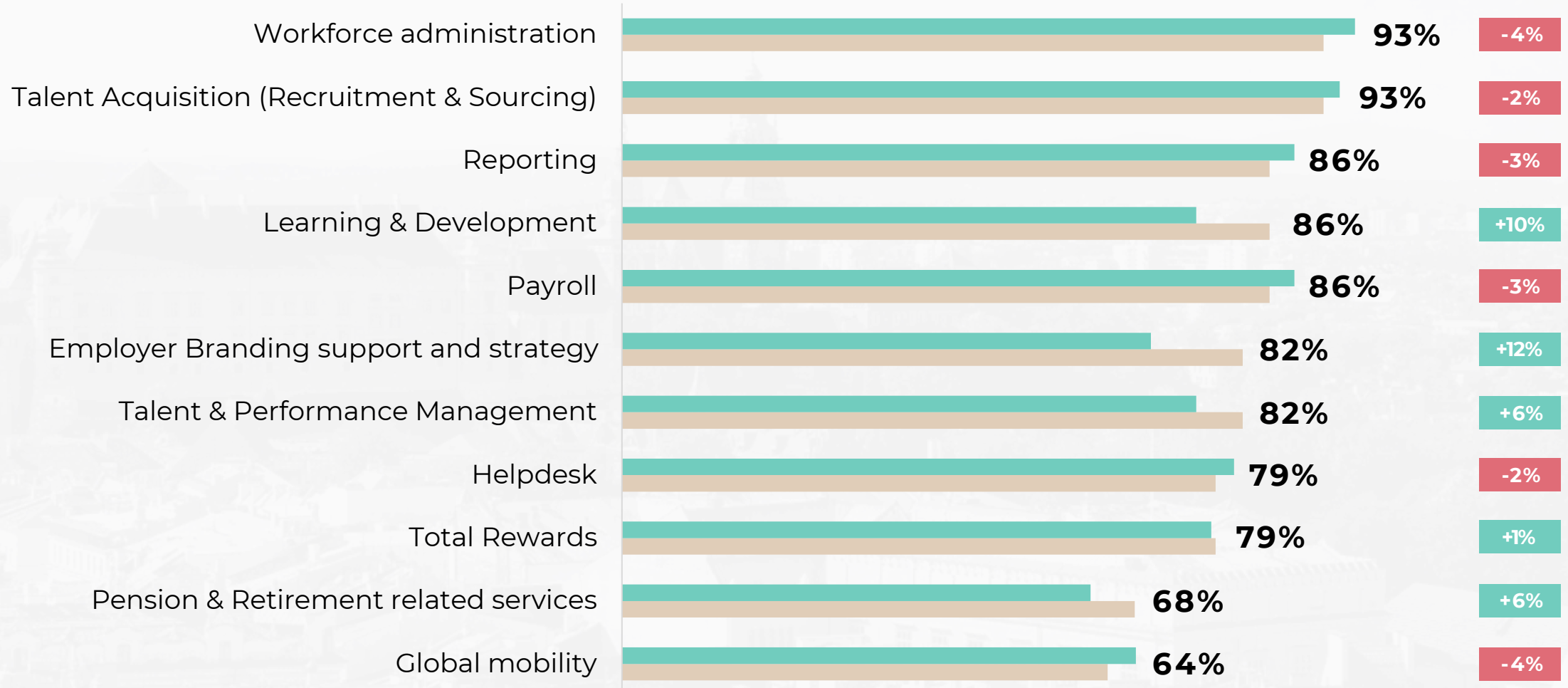


PROCESS TRACKER 2024

Human Resources

HR

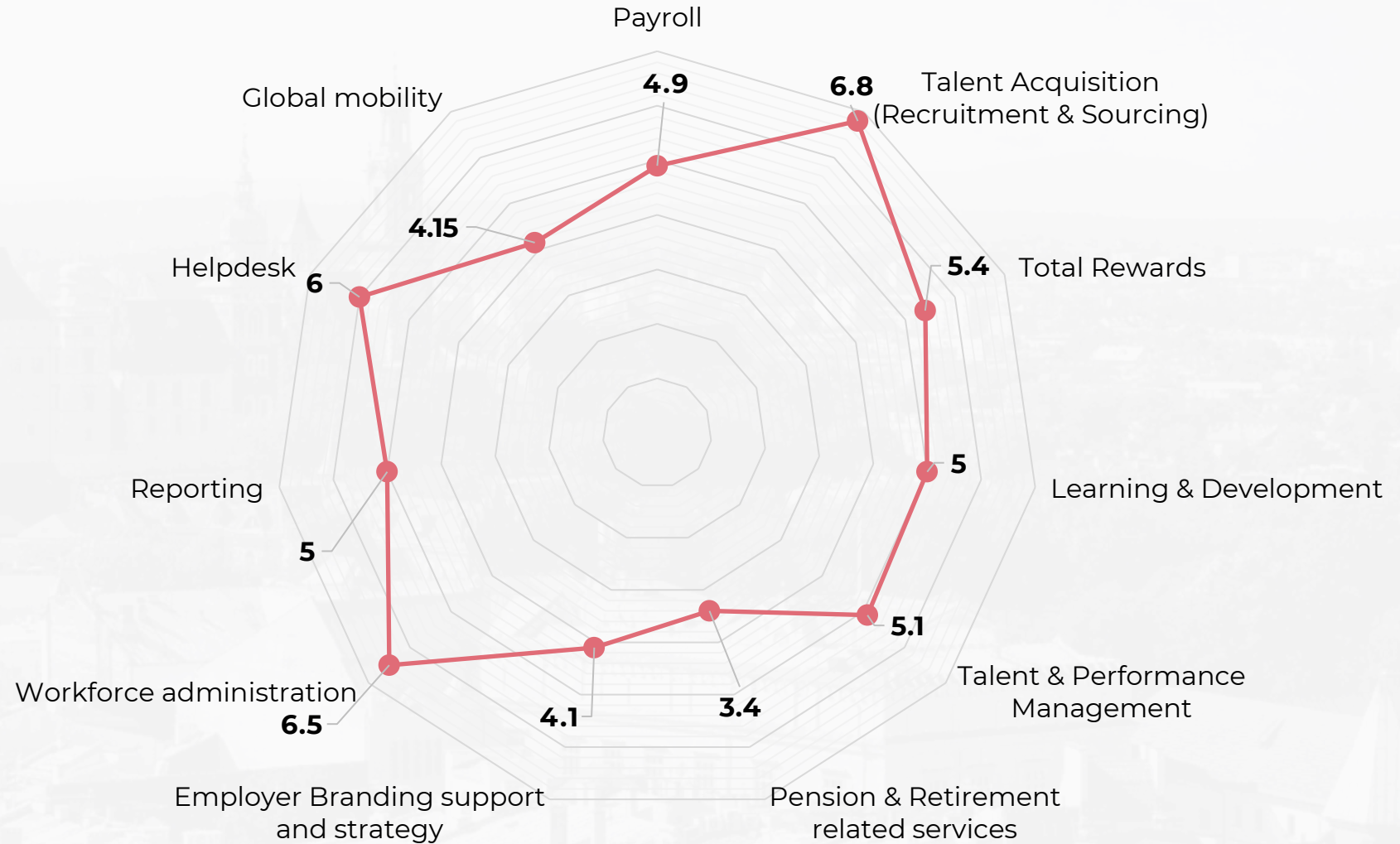
% of centres delivering a given service line



2022 2024

Service Delivery Lines

Level of concentration



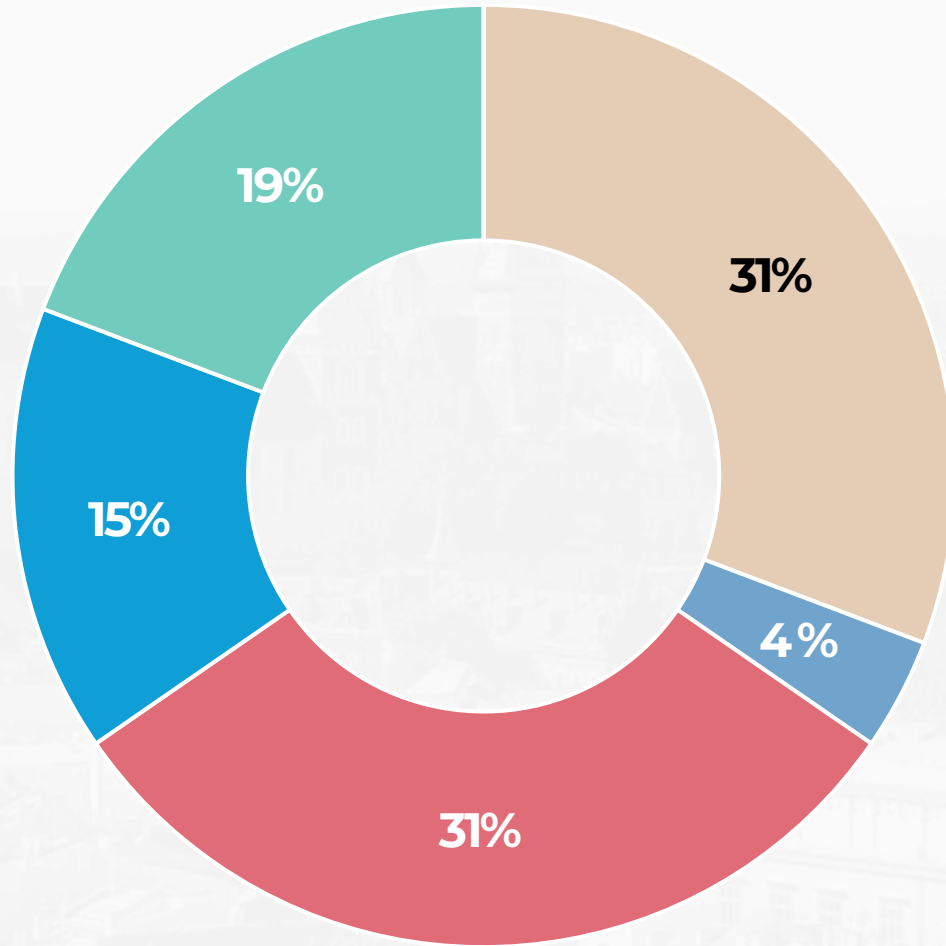
Concentration Index

Where:

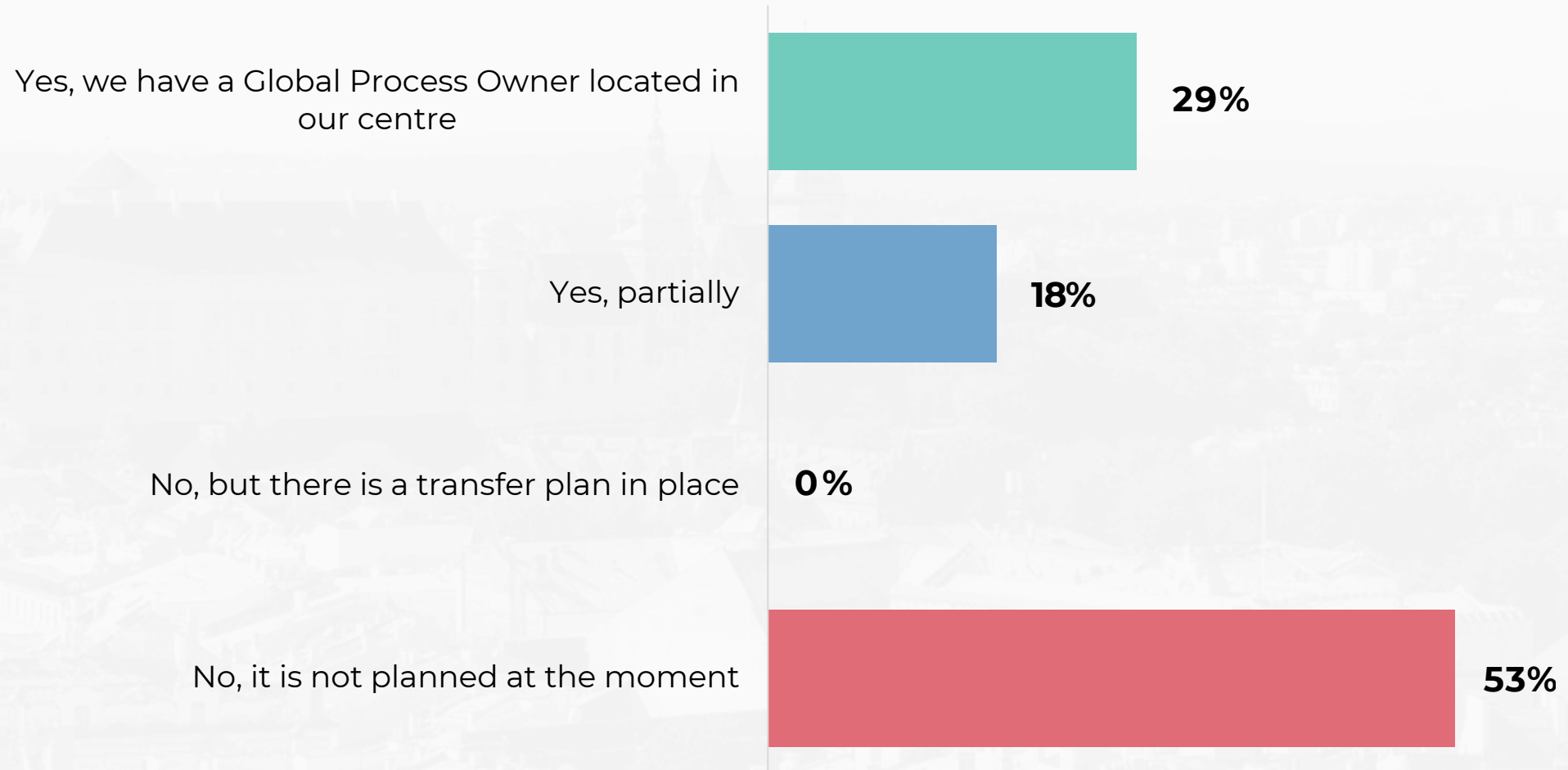
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HR

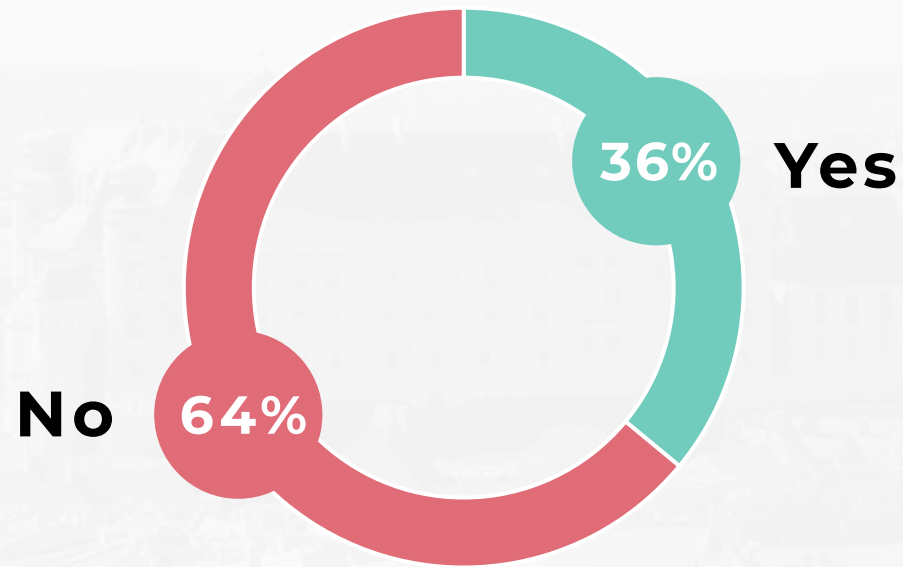
% of capacity release last financial year per date of centre establishment



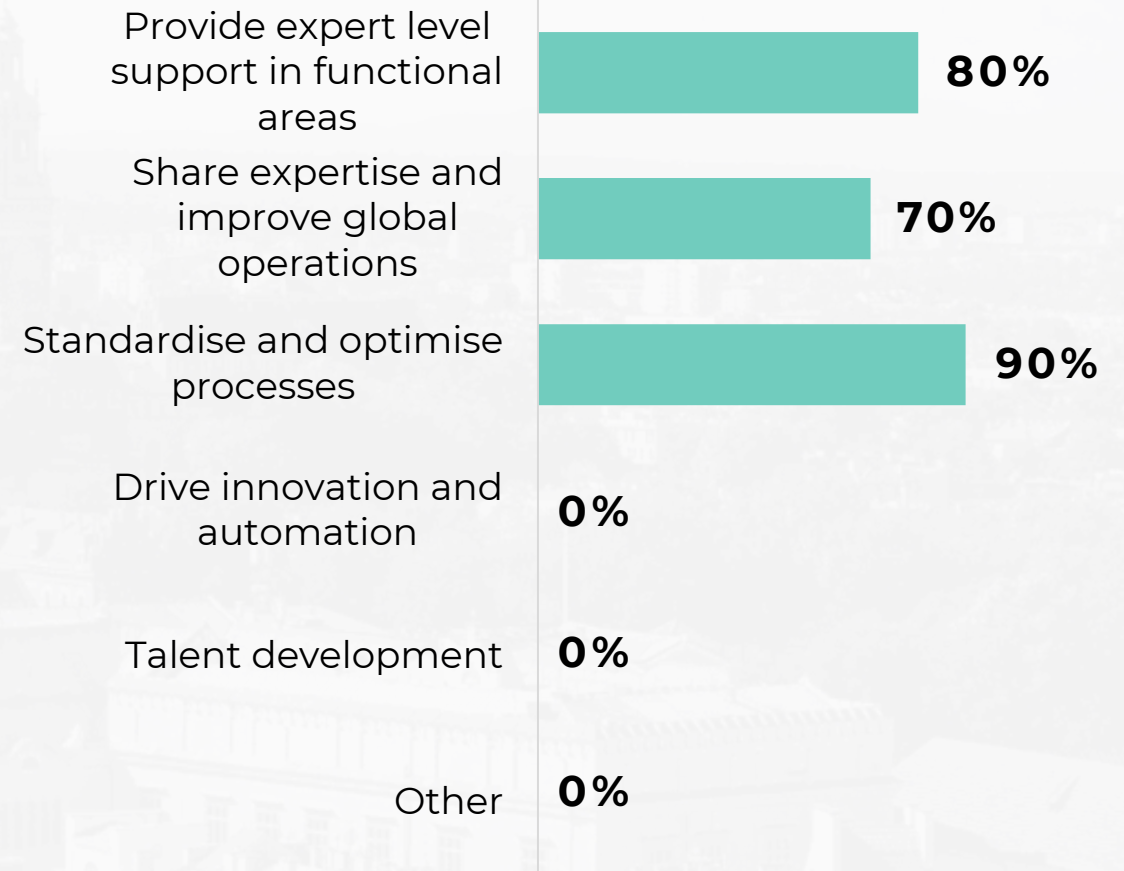
Is the role of the Global Process Owner located within your Human Resources Services Delivery pillar?



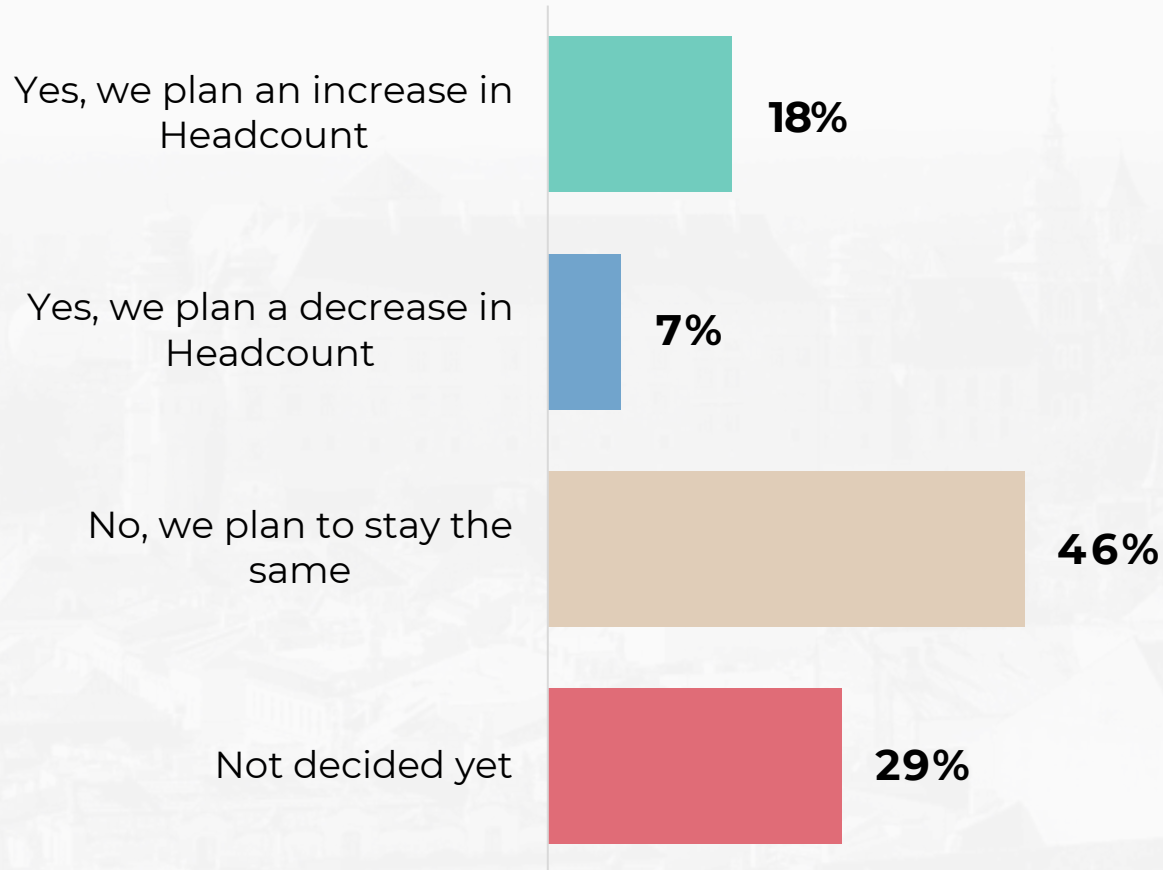
Do you **have a Centre of Excellence** in your Human Resources Services Delivery pillar?



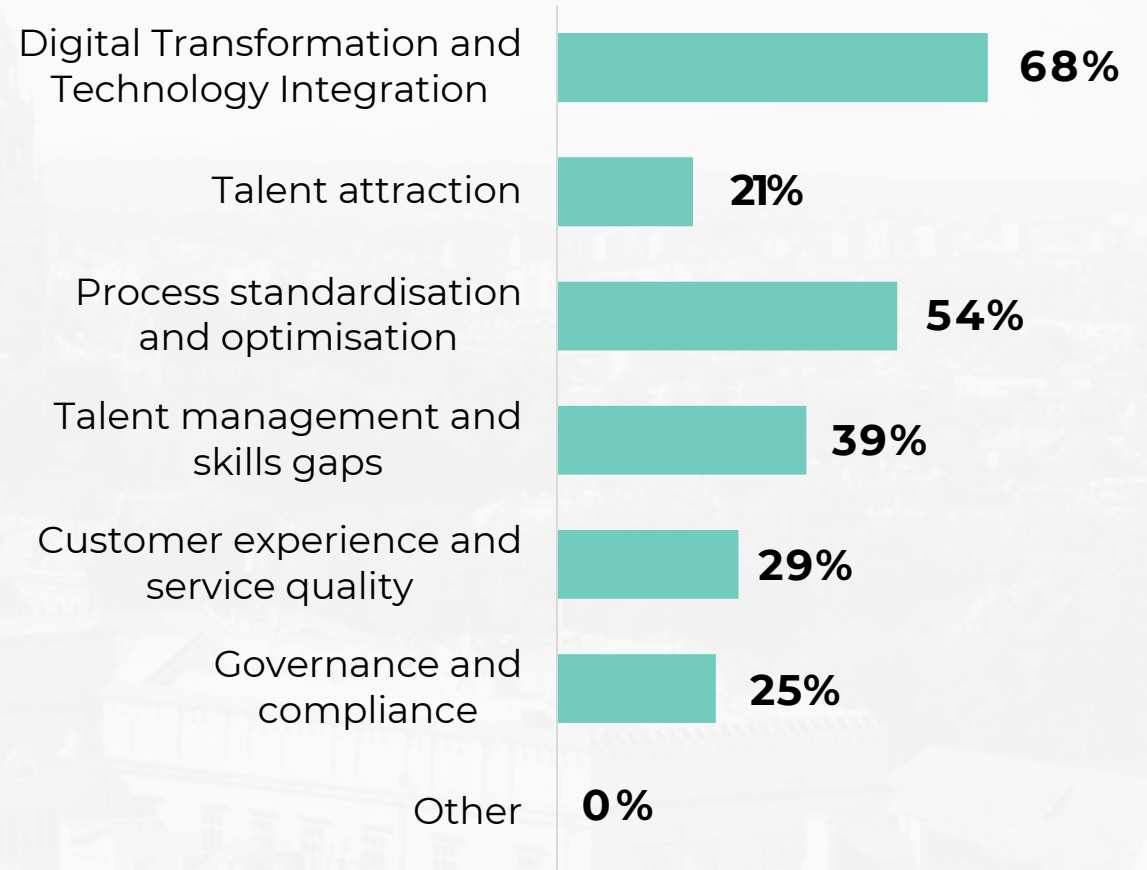
What is the **primary role** of the Centre of Excellence in your Human Resources Services Delivery pillar?



Are you planning a **change in headcount** in your Human Resources Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Human Resources Services Delivery pillar?



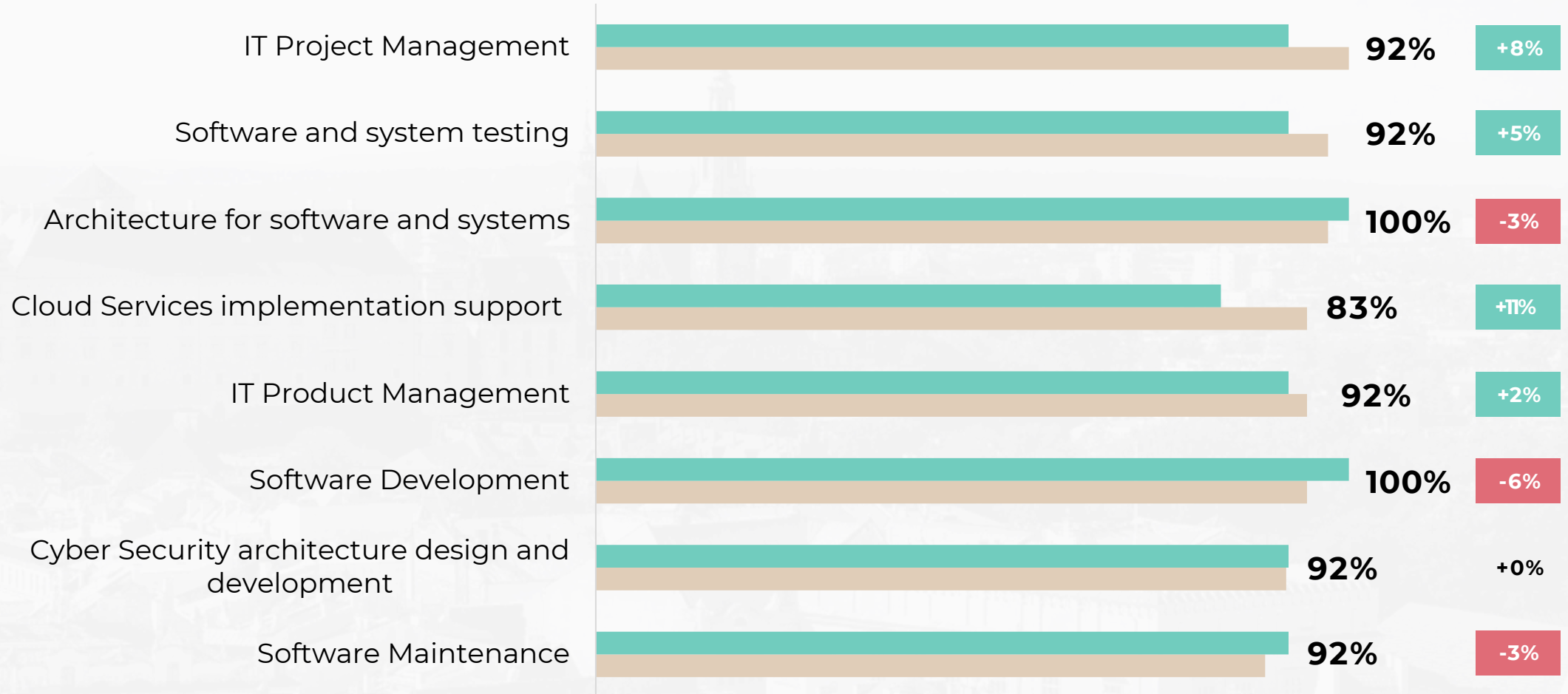


PROCESS TRACKER 2024

**IT (Design &
Development)**

IT Design & Development

% of centres delivering a given service line

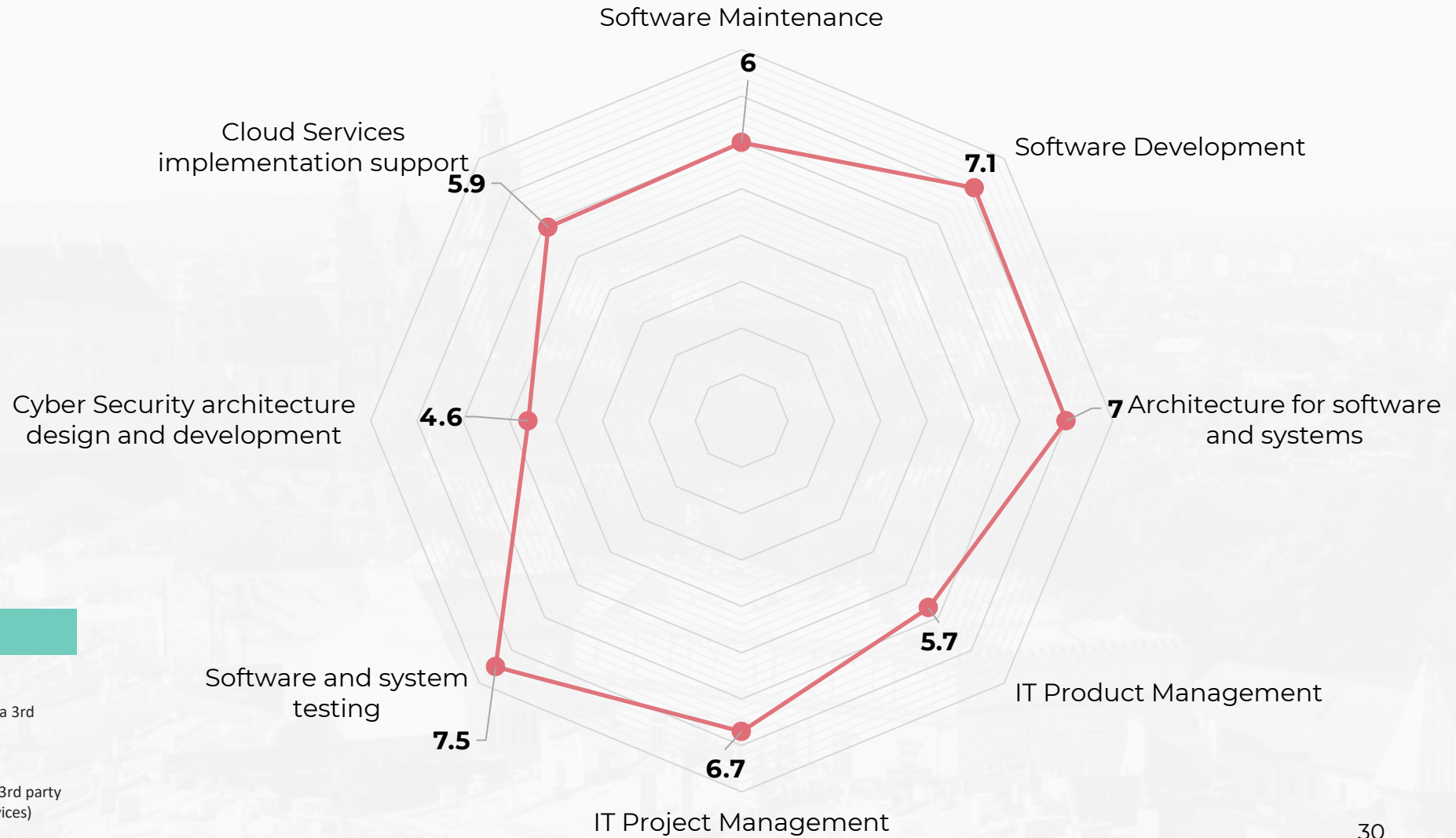


2022

2024

Service Delivery Lines

Level of concentration



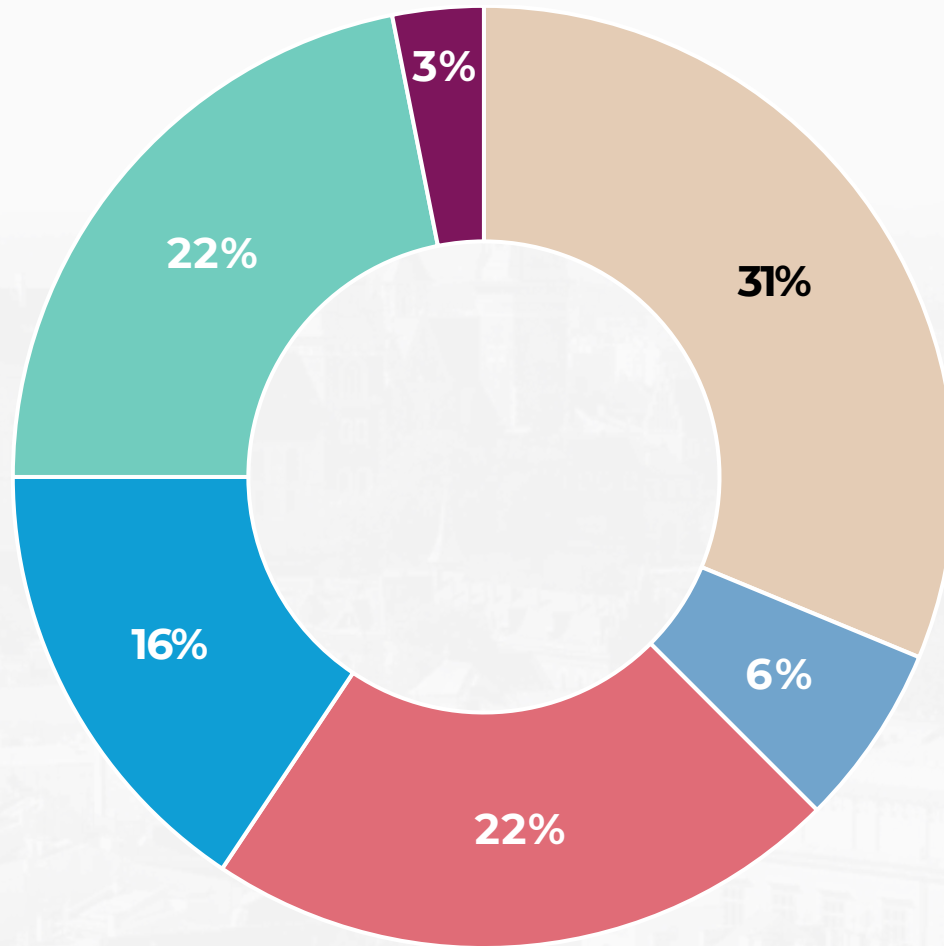
Concentration Index

Where:

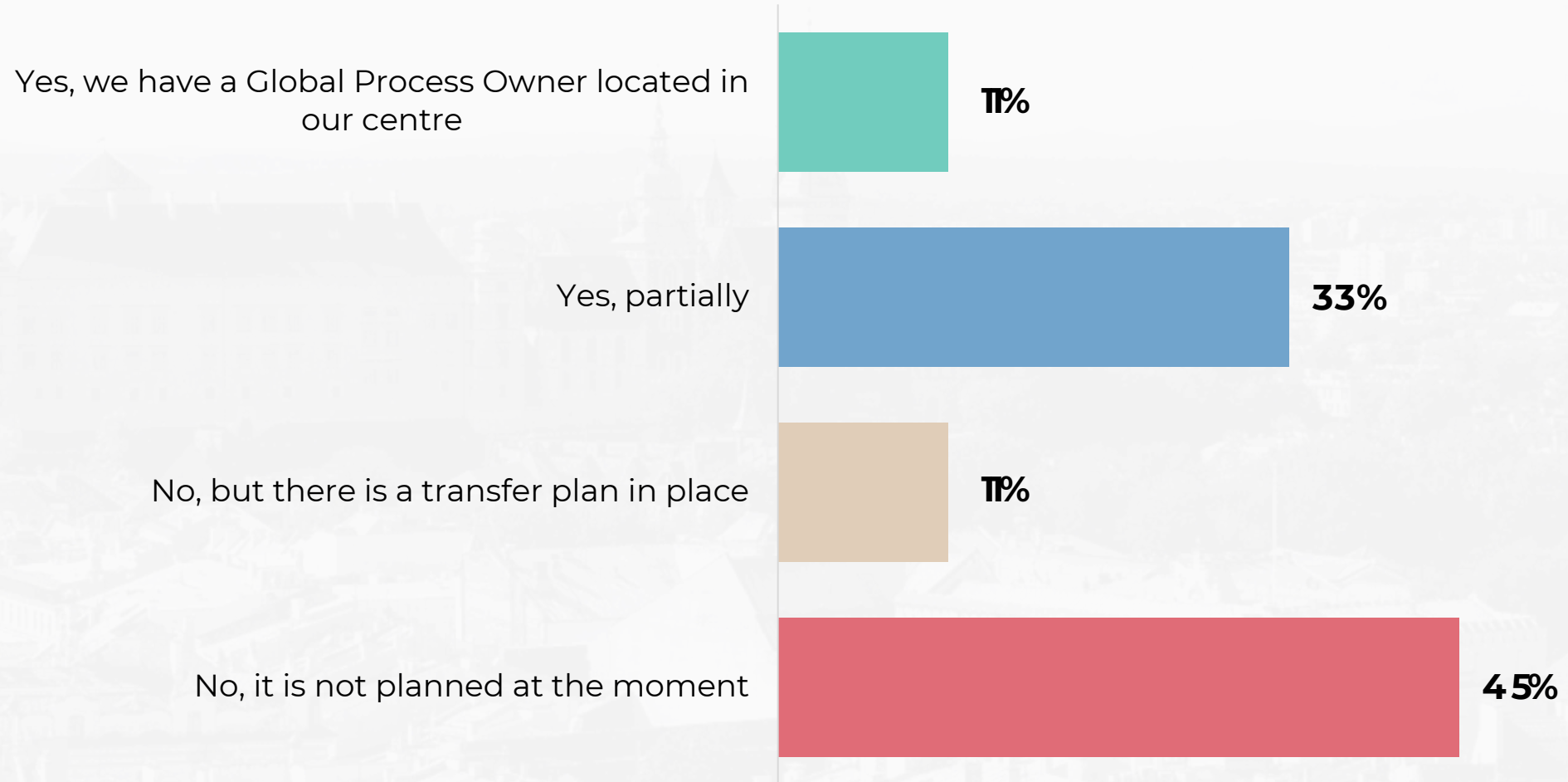
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IT Design & Development

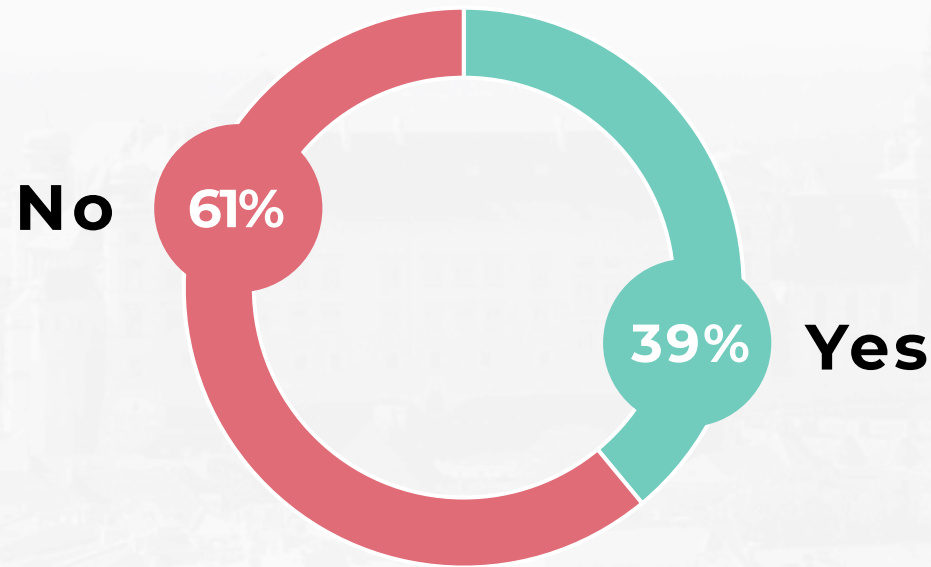
% of capacity release last financial year per date of centre establishment



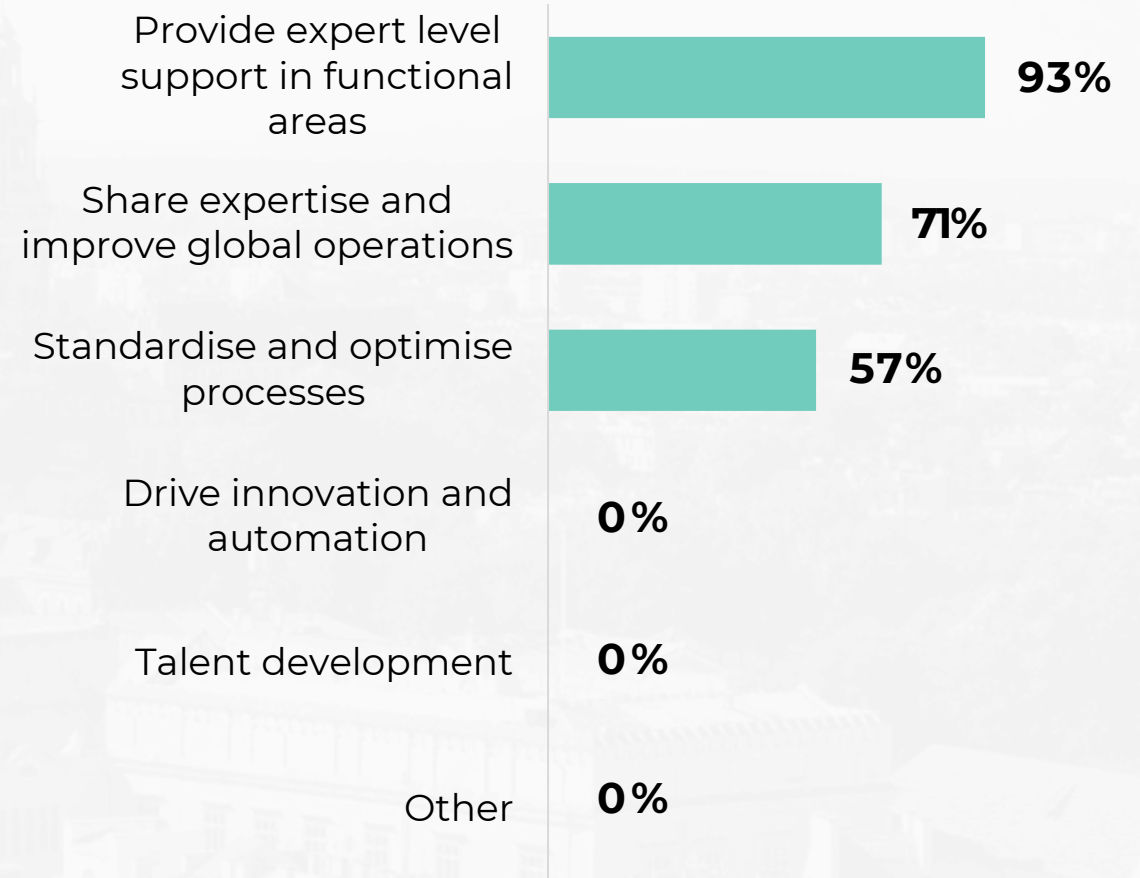
Is the role of the Global Process Owner located within your IT (Design & Development) Services Delivery pillar?



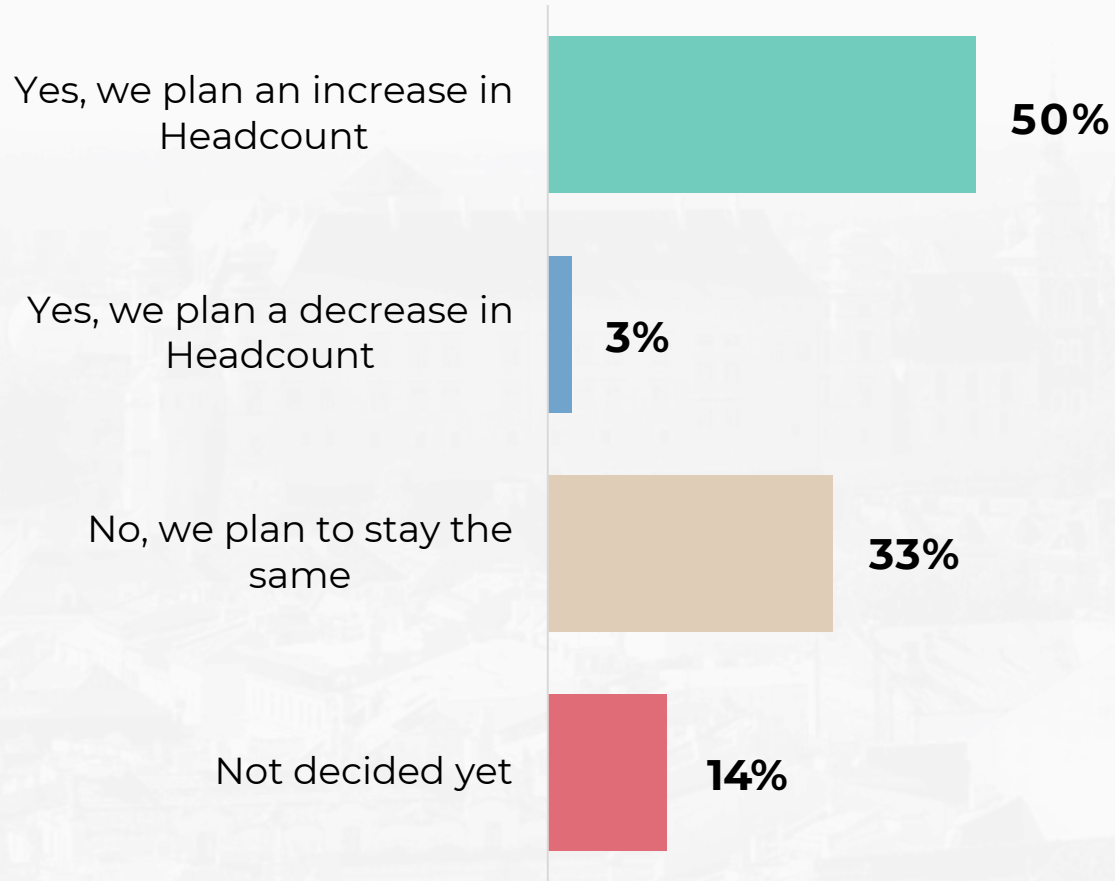
Do you **have a Centre of Excellence** in your IT (Design & Development) Services Delivery pillar?



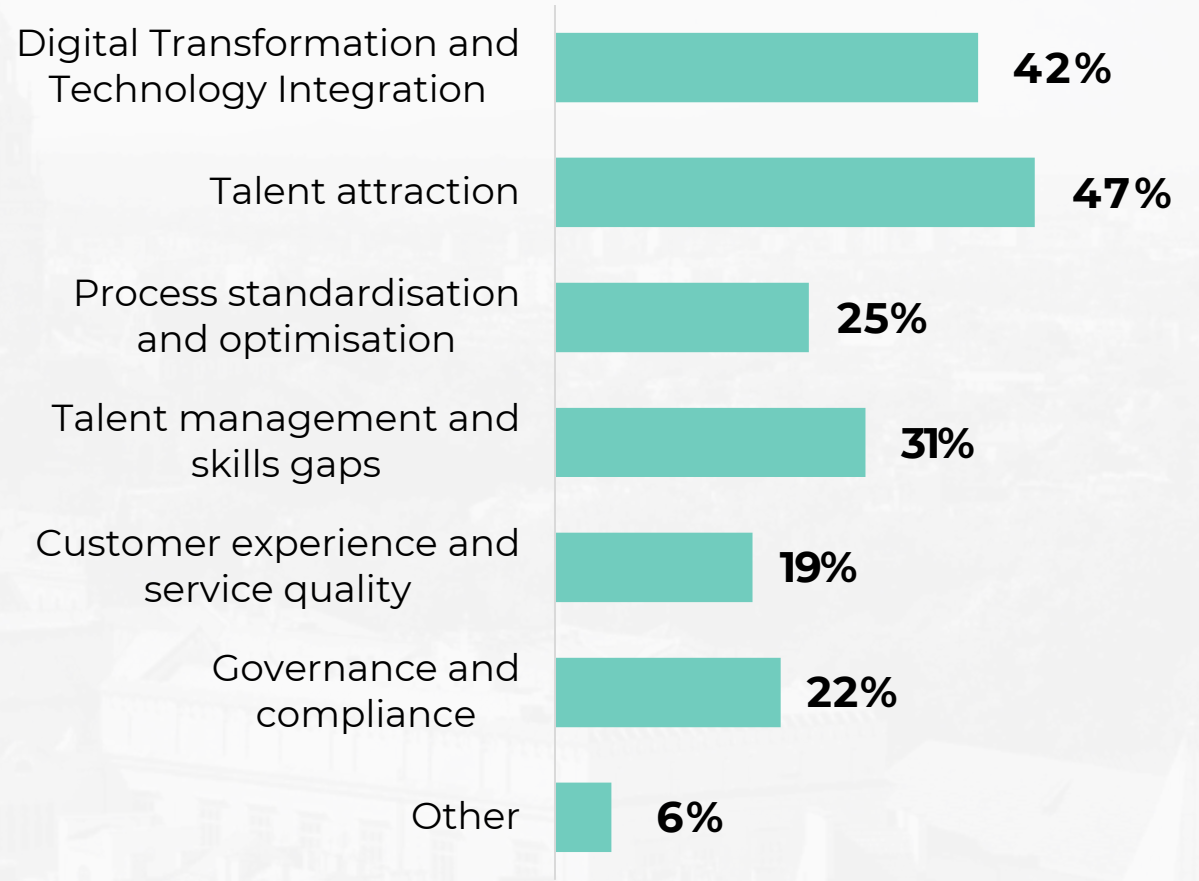
What is the **primary role** of the Centre of Excellence in your IT (Design & Development) Services Delivery pillar?



Are you planning a **change in headcount** in your IT (Design & Development) Services Delivery pillar over the next 12 months?



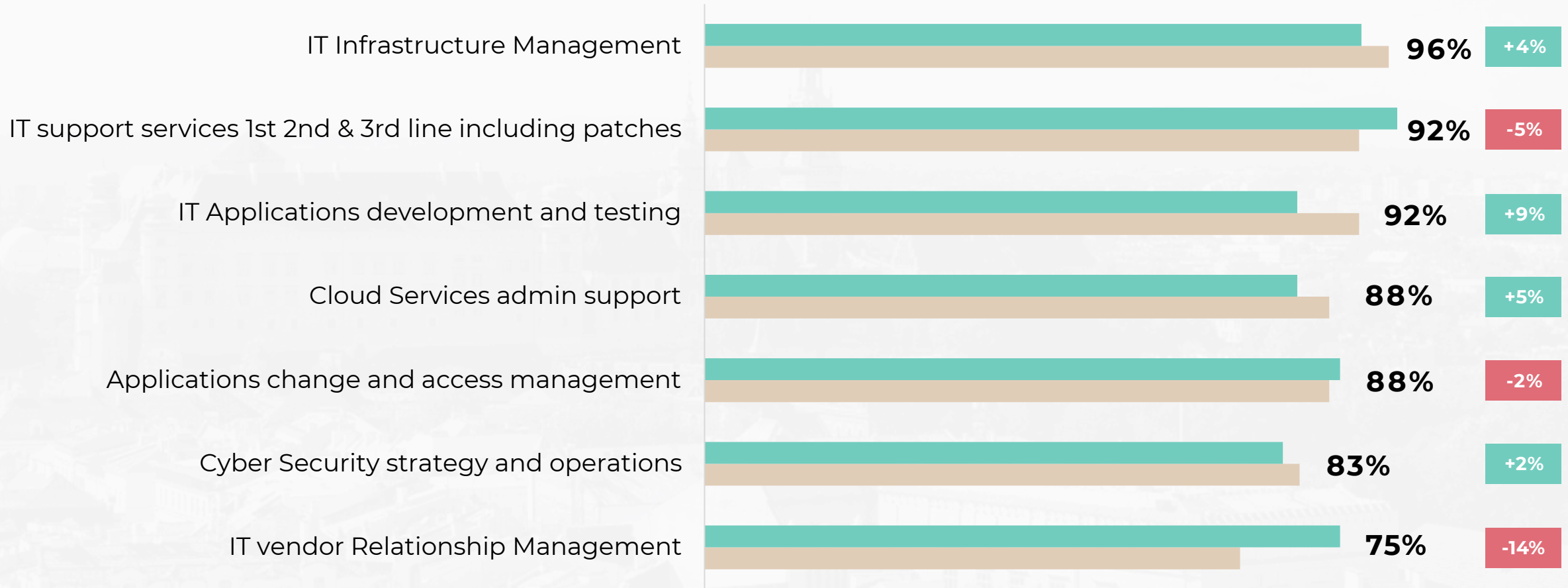
What are the **biggest challenges** in your IT (Design & Development) Services Delivery pillar?



IT (Internal)

IT (Internal)

% of centres delivering a given service line

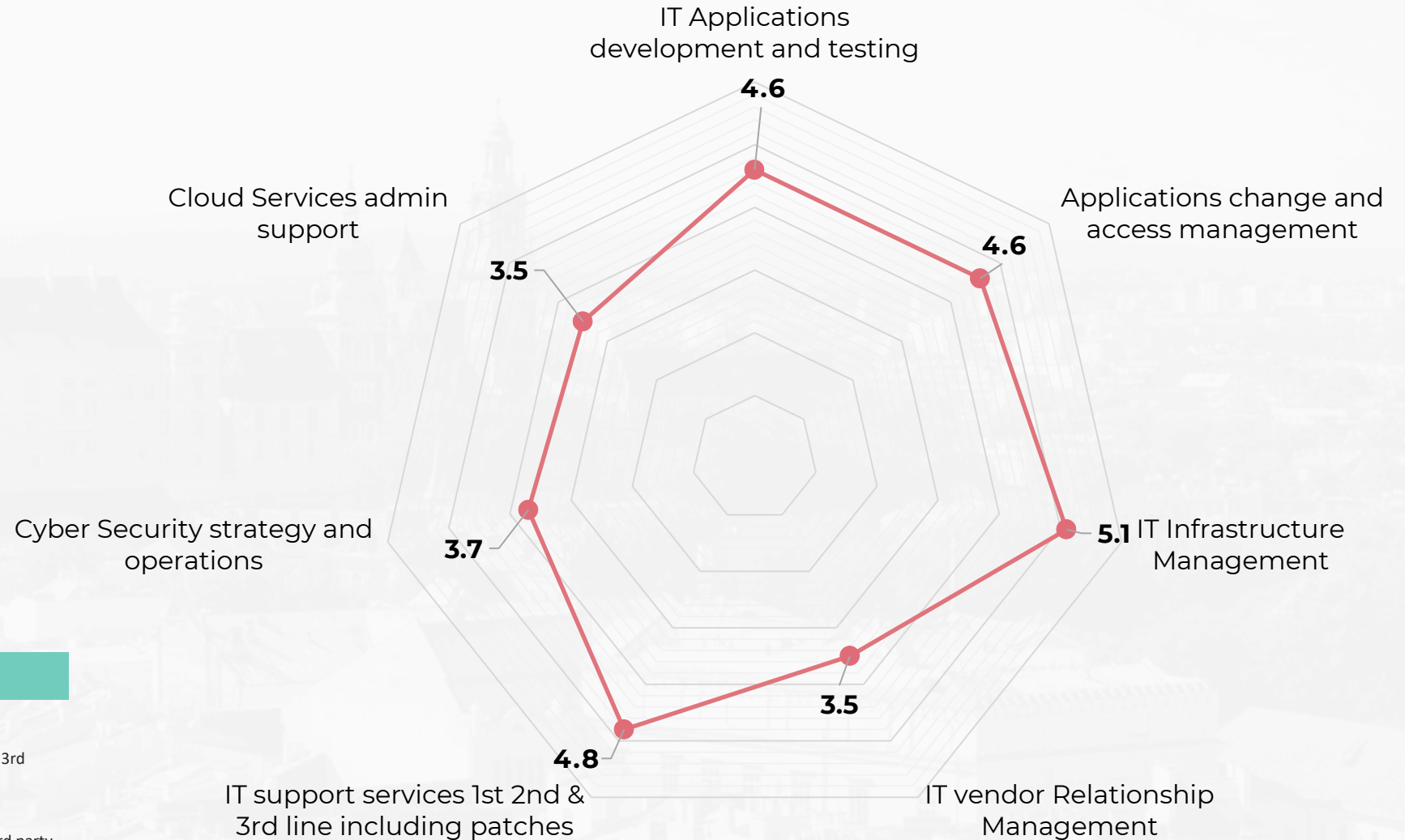


2022

2024

Service Delivery Lines

Level of concentration



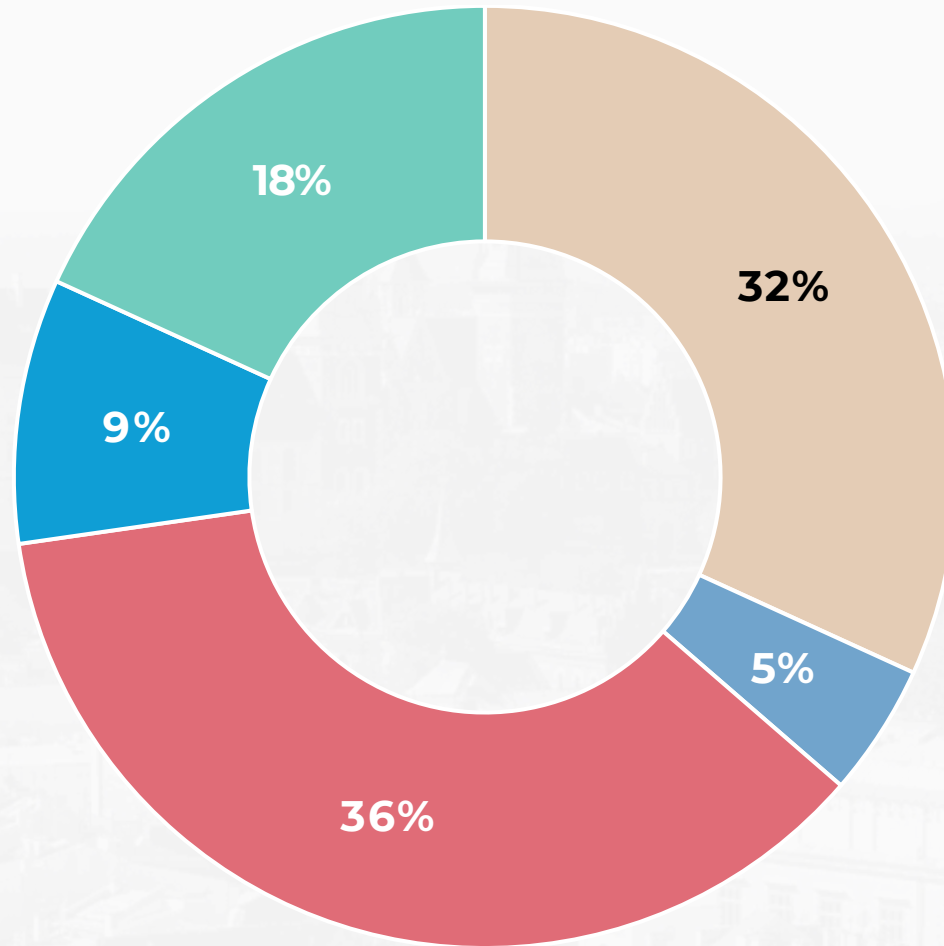
Concentration Index

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IT (Internal)

% of capacity release last financial year per date of centre establishment



Pre 2006

2007-2010

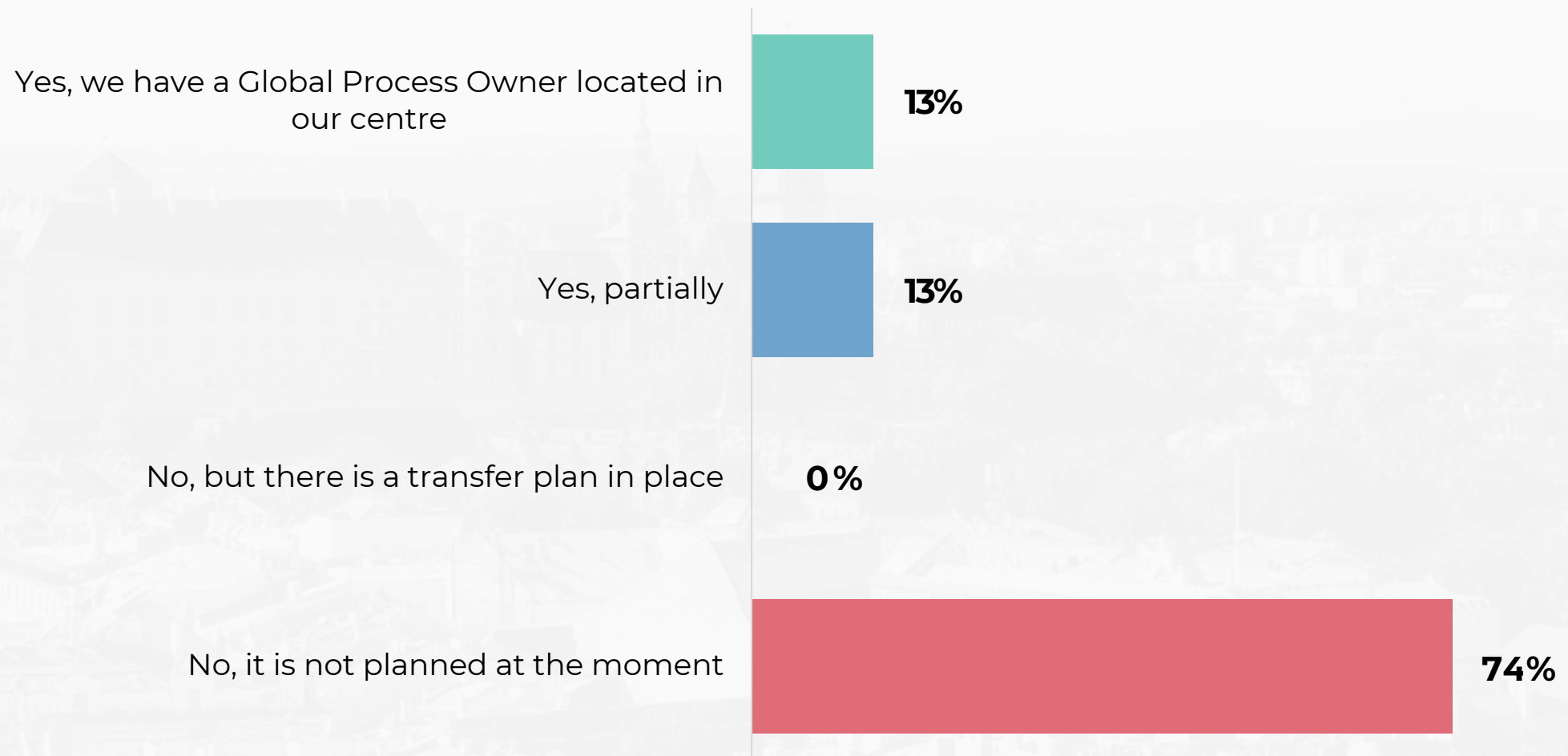
2011-2014

2015-2018

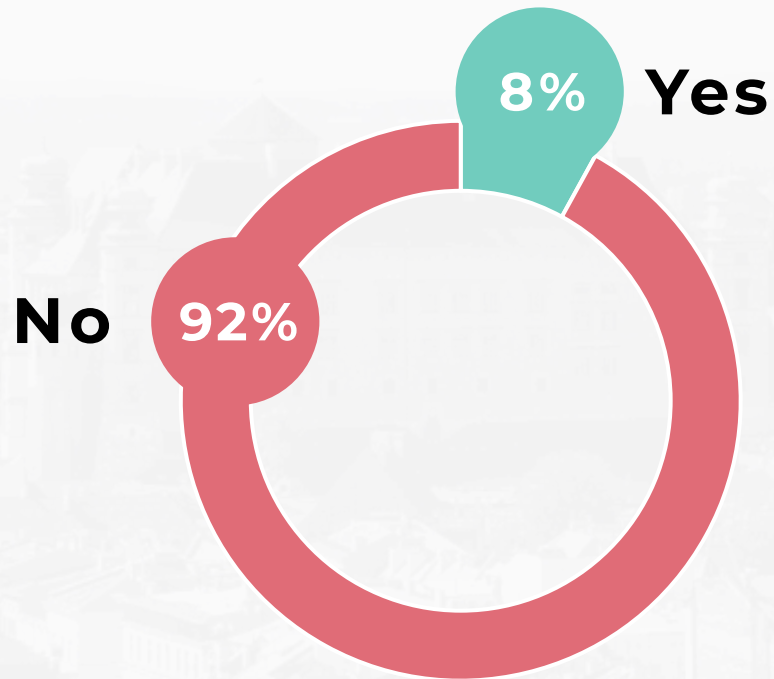
2019-2022

2023-2024

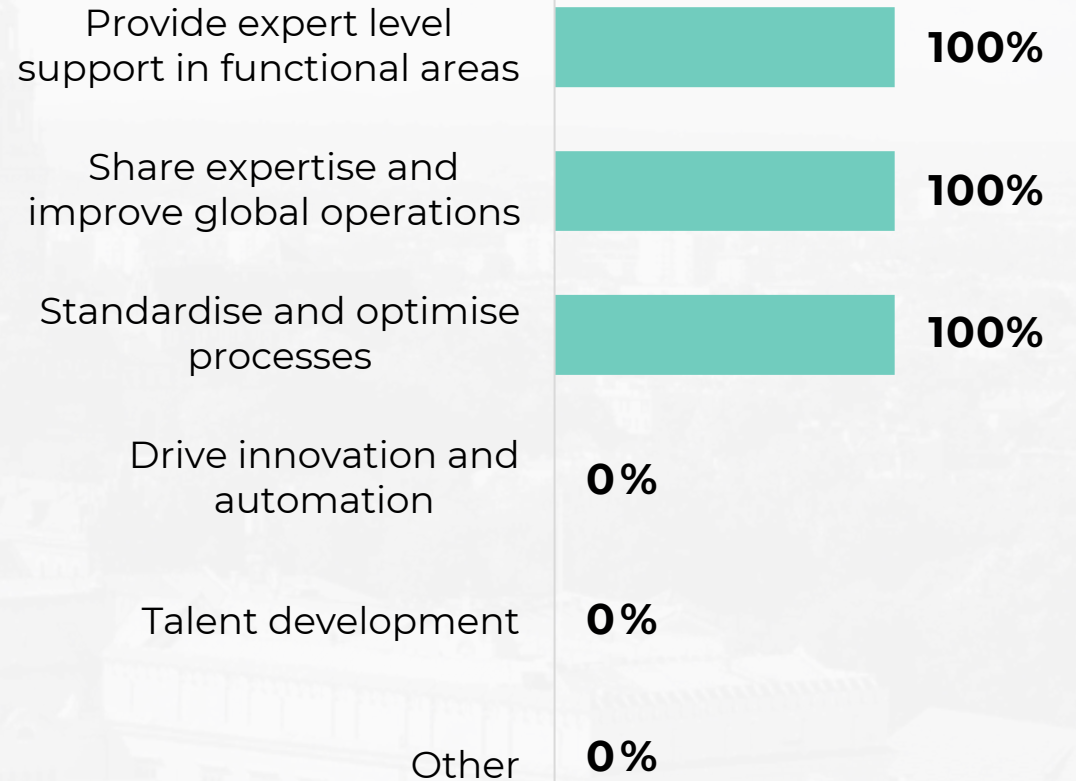
Is the role of the Global Process Owner located within your IT (Internal) Services Delivery pillar?



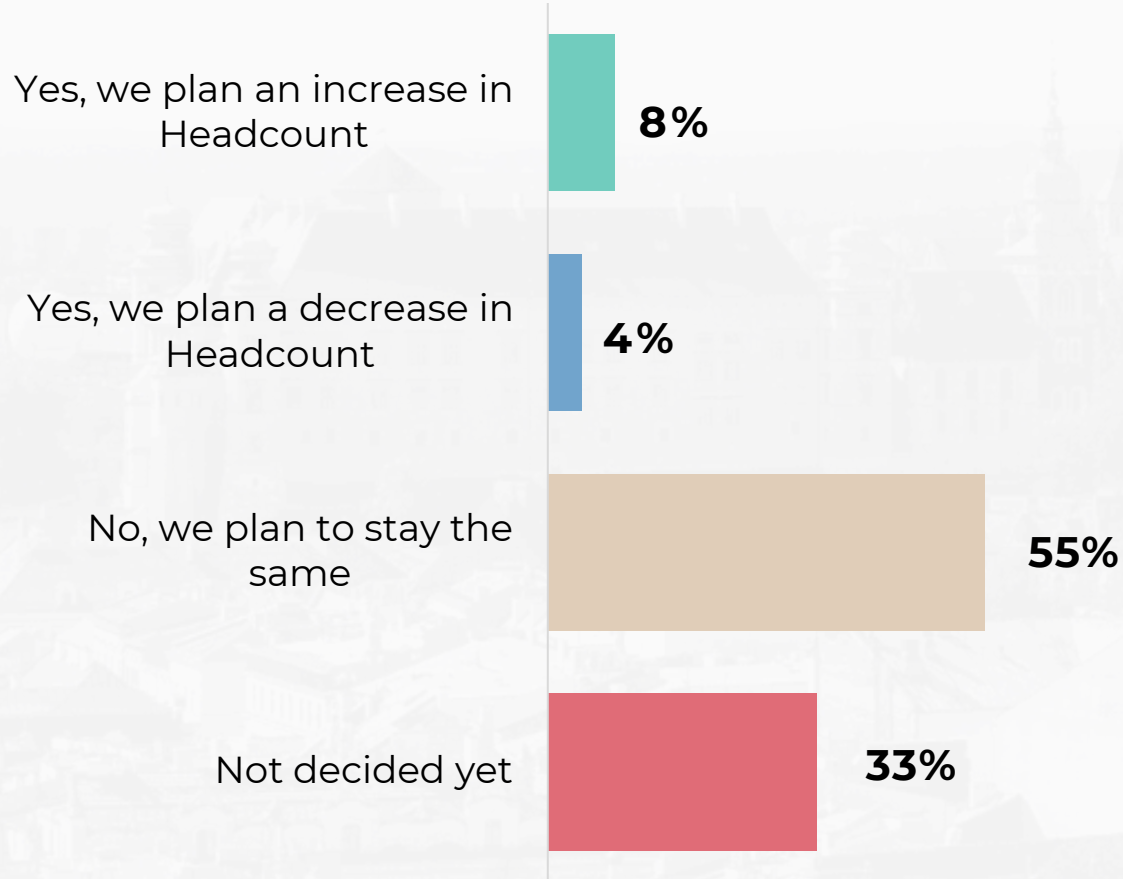
Do you **have a Centre of Excellence** in your IT (Internal) Services Delivery pillar?



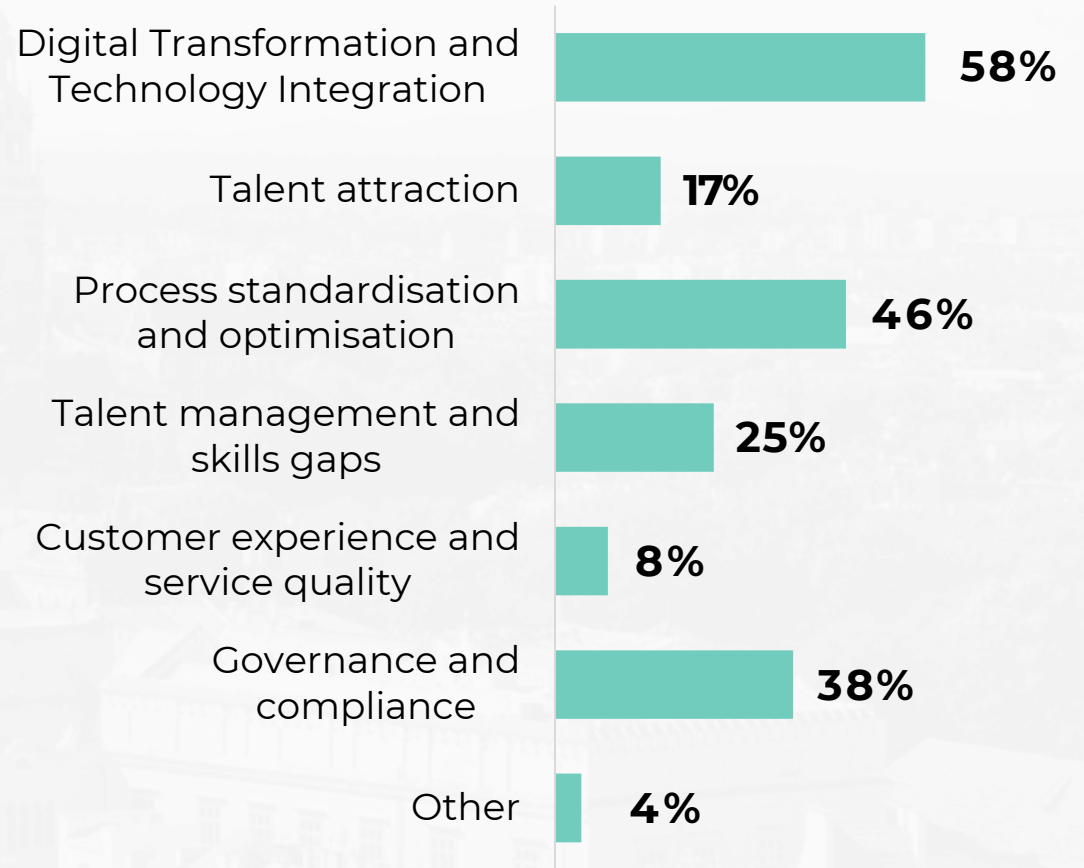
What is the **primary role** of the Centre of Excellence in your IT (Internal) Services Delivery pillar?



Are you planning a **change in headcount** in your IT (Internal) Services Delivery pillar over the next 12 months?



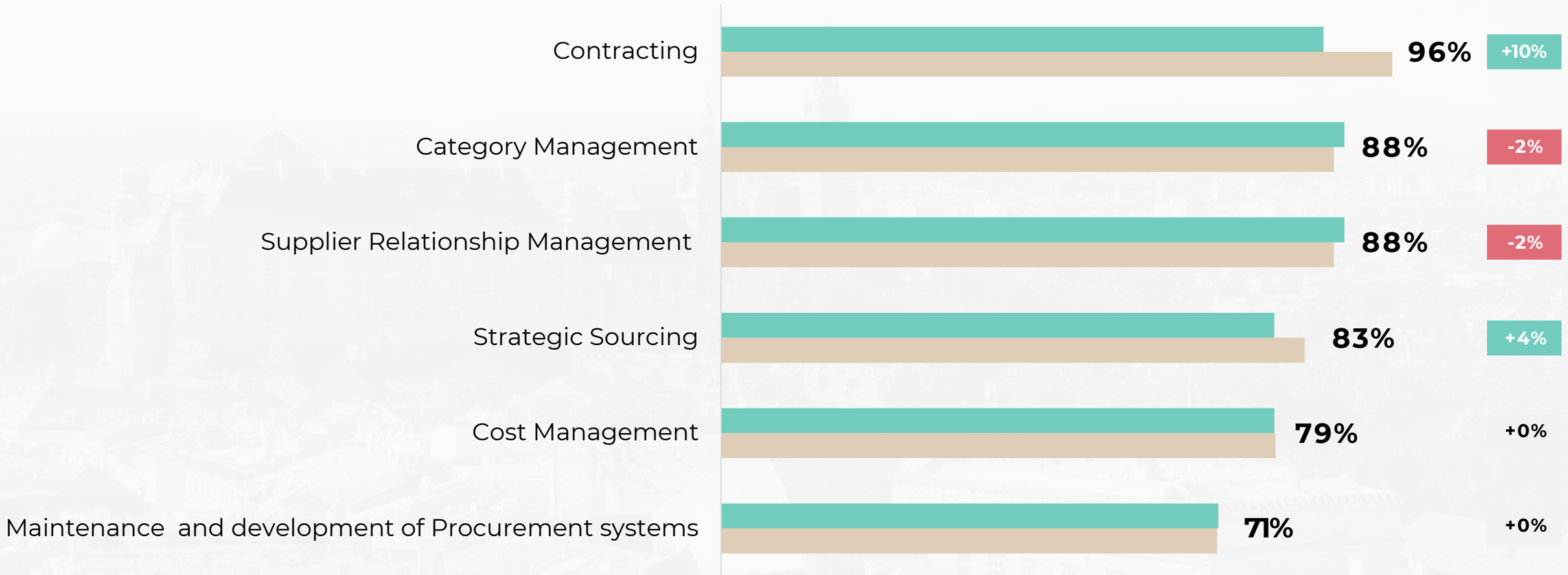
What are the **biggest challenges** in your IT (Internal) Services Delivery pillar?



Procurement

Procurement

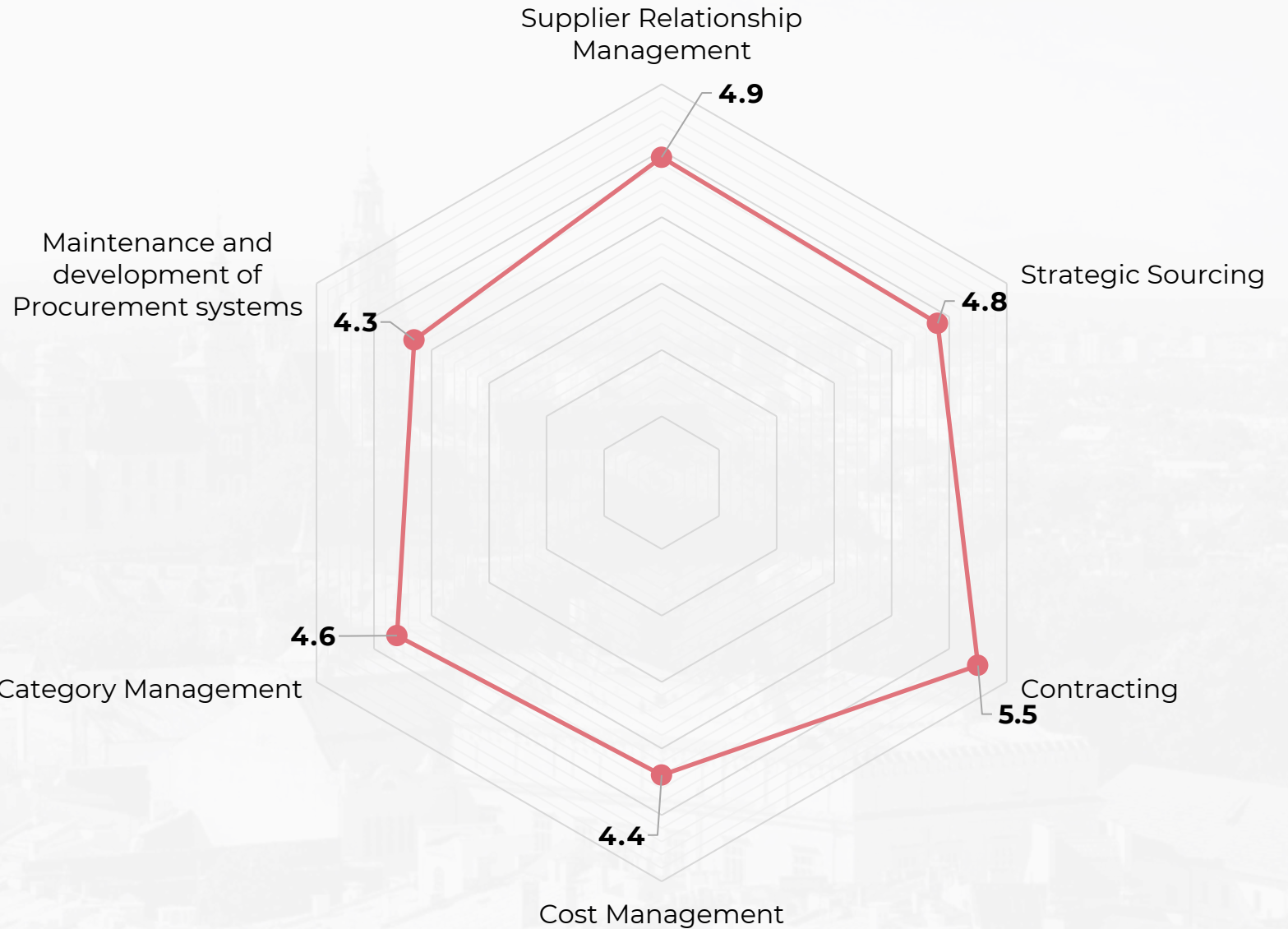
% of centres delivering a given service line



2022 2024

Service Delivery Lines

Level of concentration



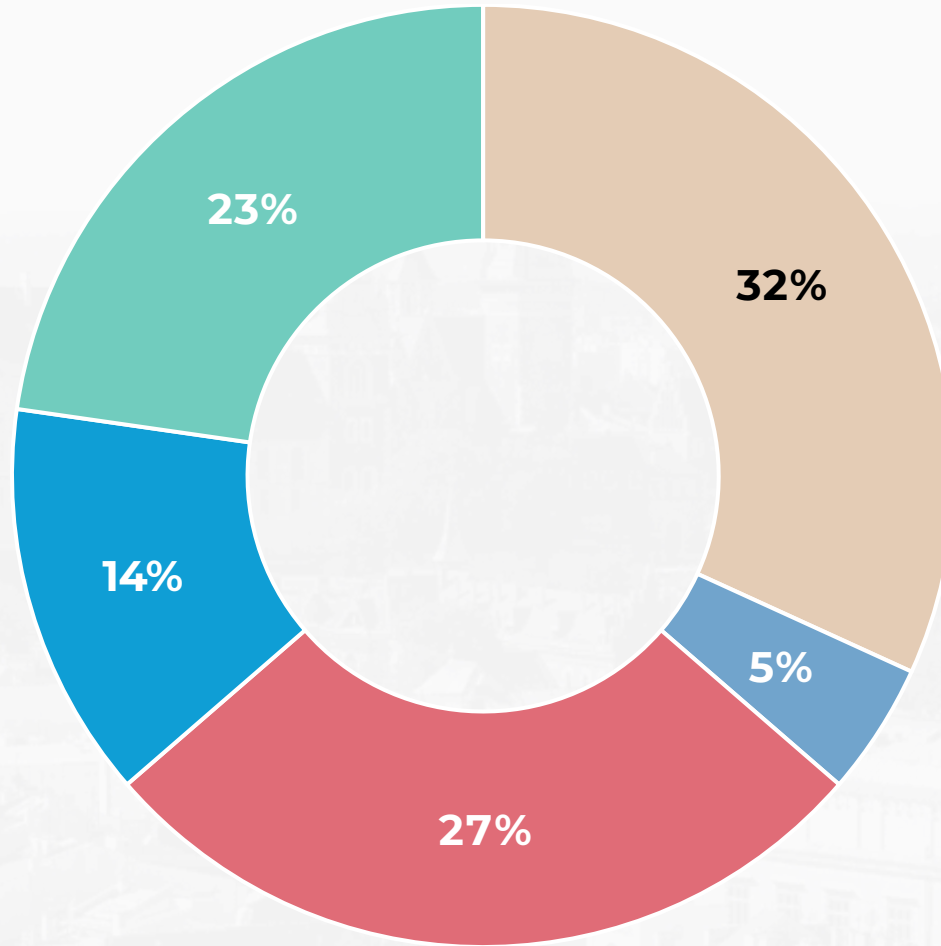
Concentration Index

Where:

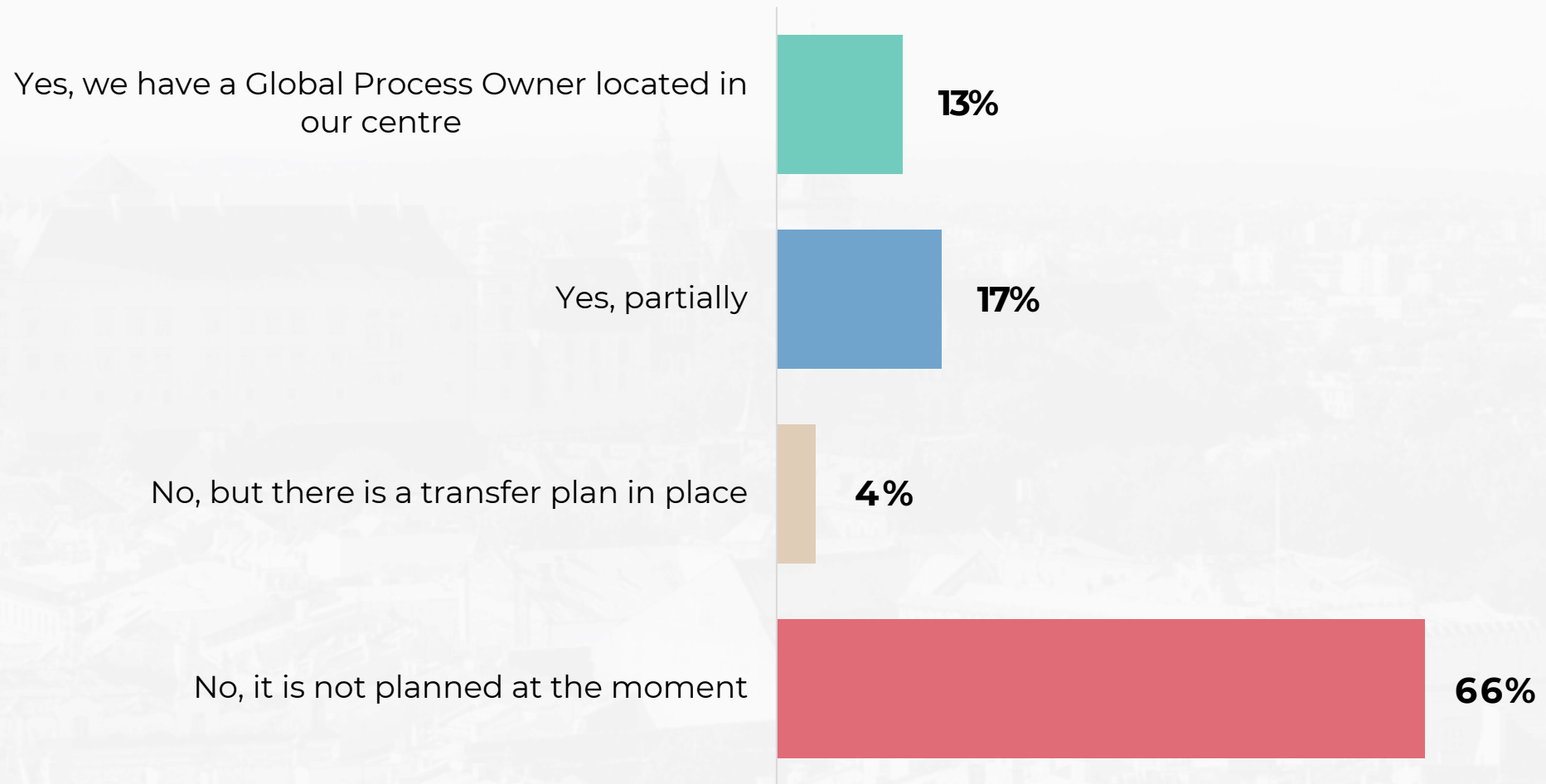
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Procurement

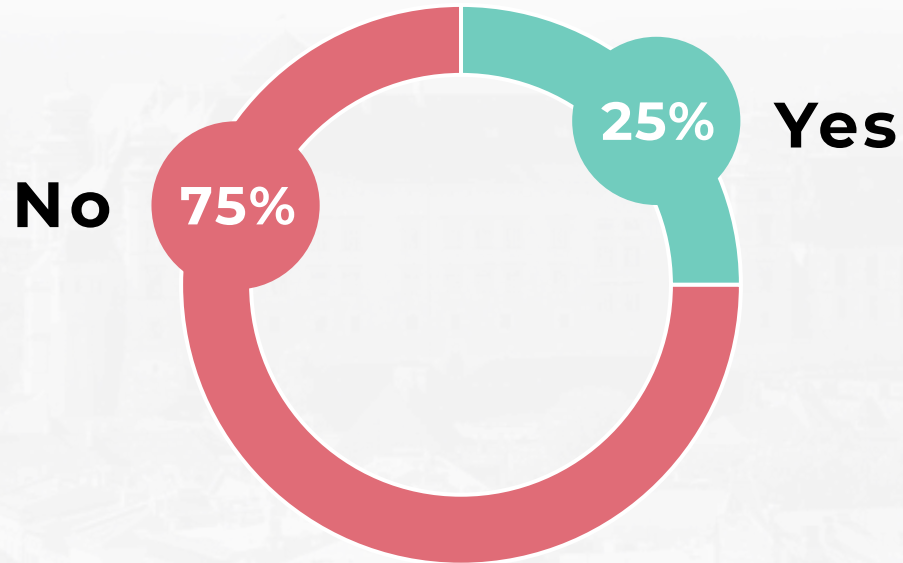
% of capacity release last financial year per date of centre establishment



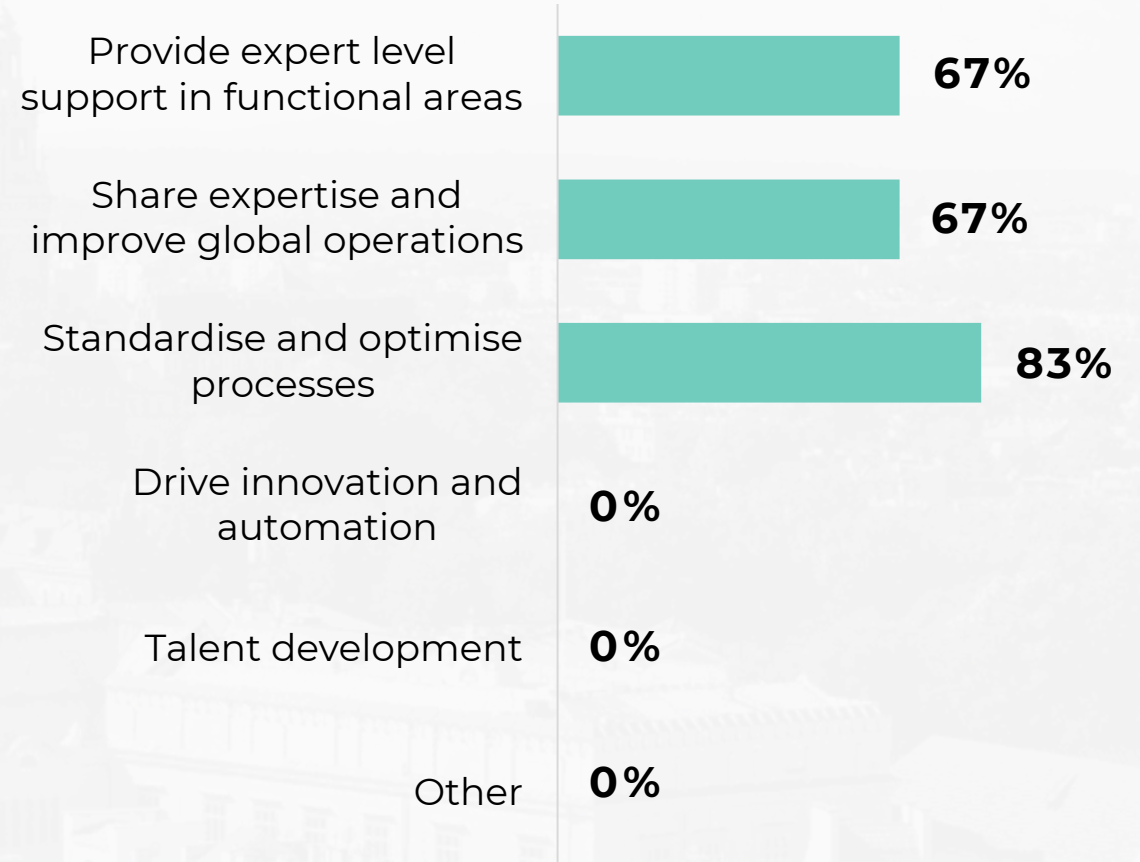
Is the role of the Global Process Owner located within your Procurement Services Delivery pillar?



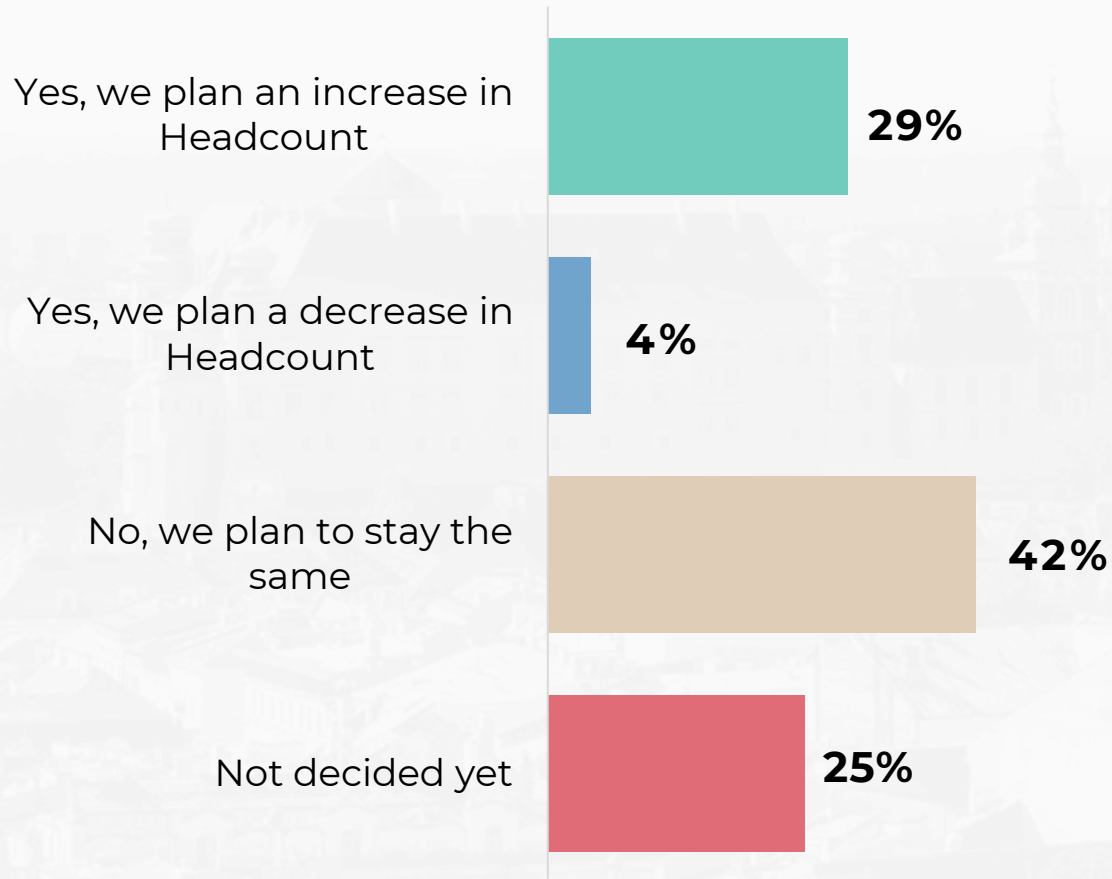
Do you **have a Centre of Excellence** in your Procurement Services Delivery pillar?



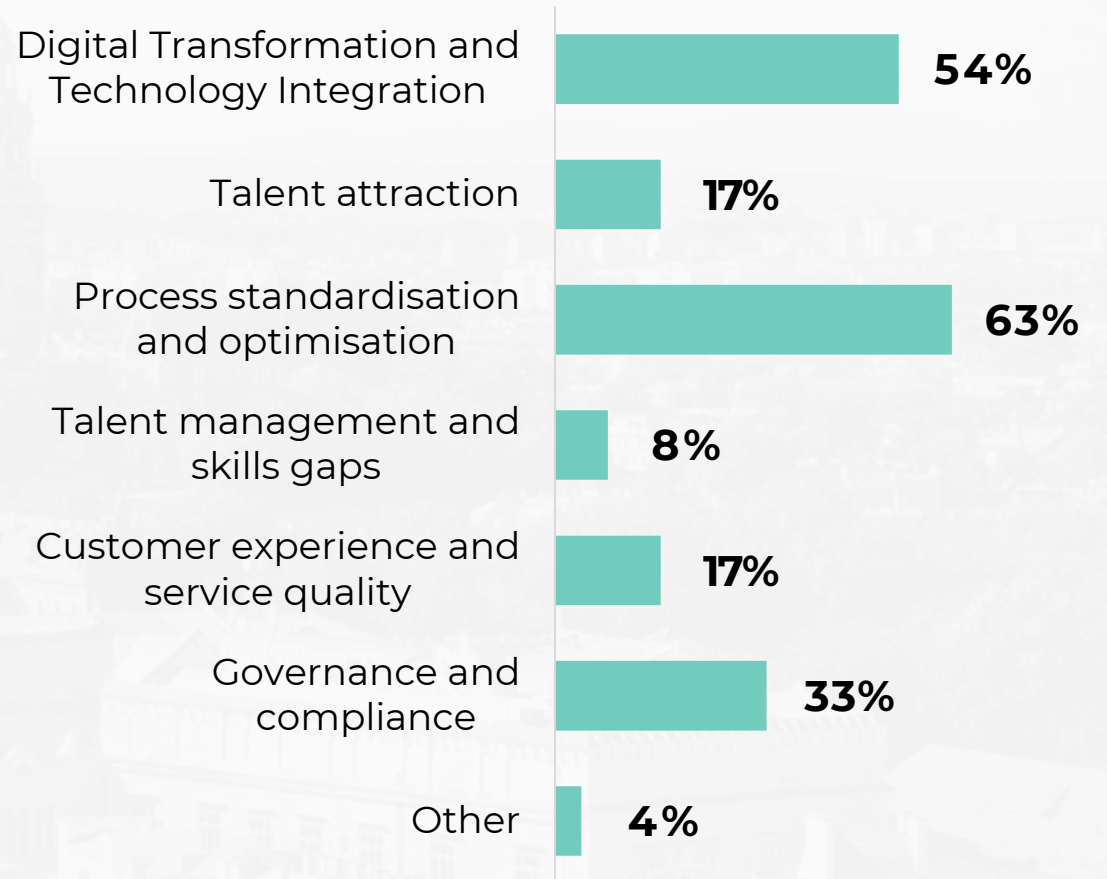
What is the **primary role** of the Centre of Excellence in your Procurement Services Delivery pillar?



Are you planning a **change in headcount** in your Procurement Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Procurement Services Delivery pillar?



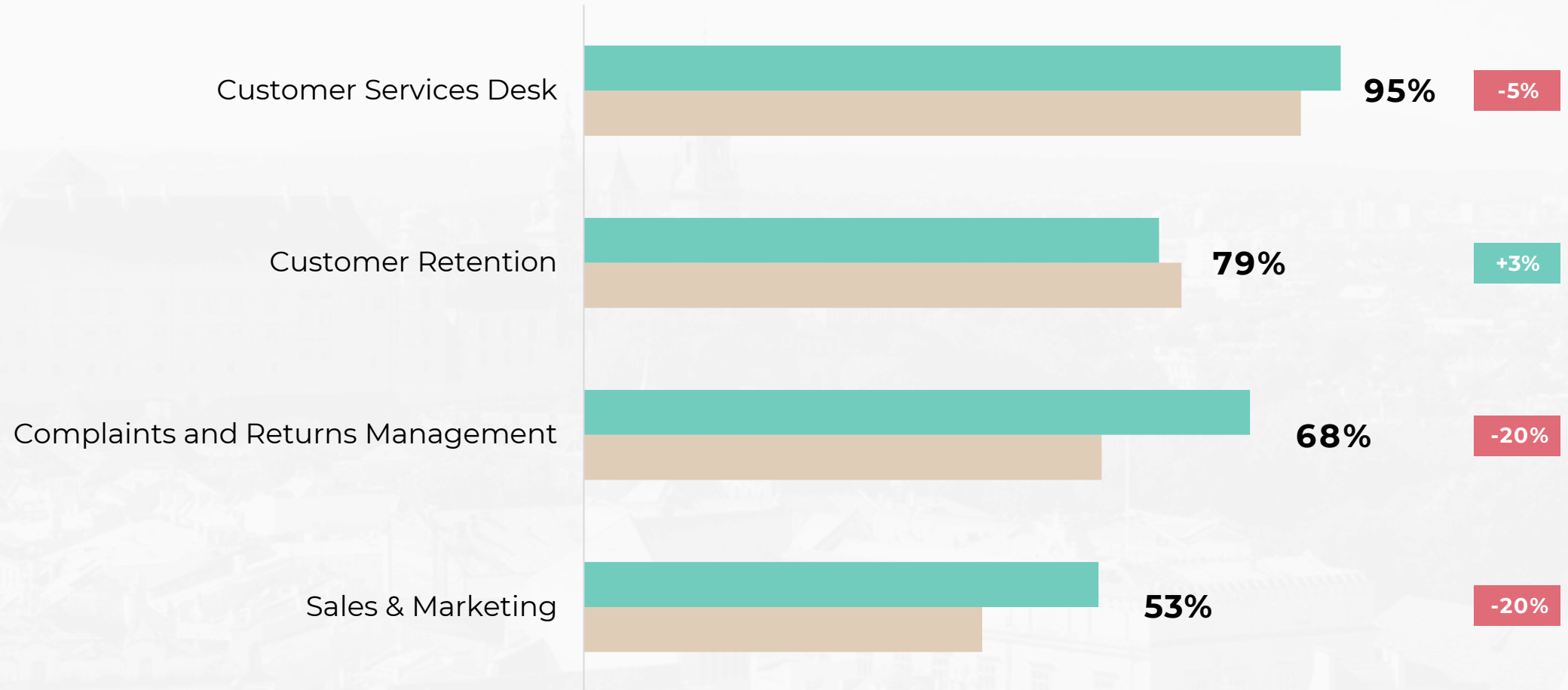


PROCESS TRACKER 2024

**Customer
Services**

Customer Services

% of centres delivering a given service line

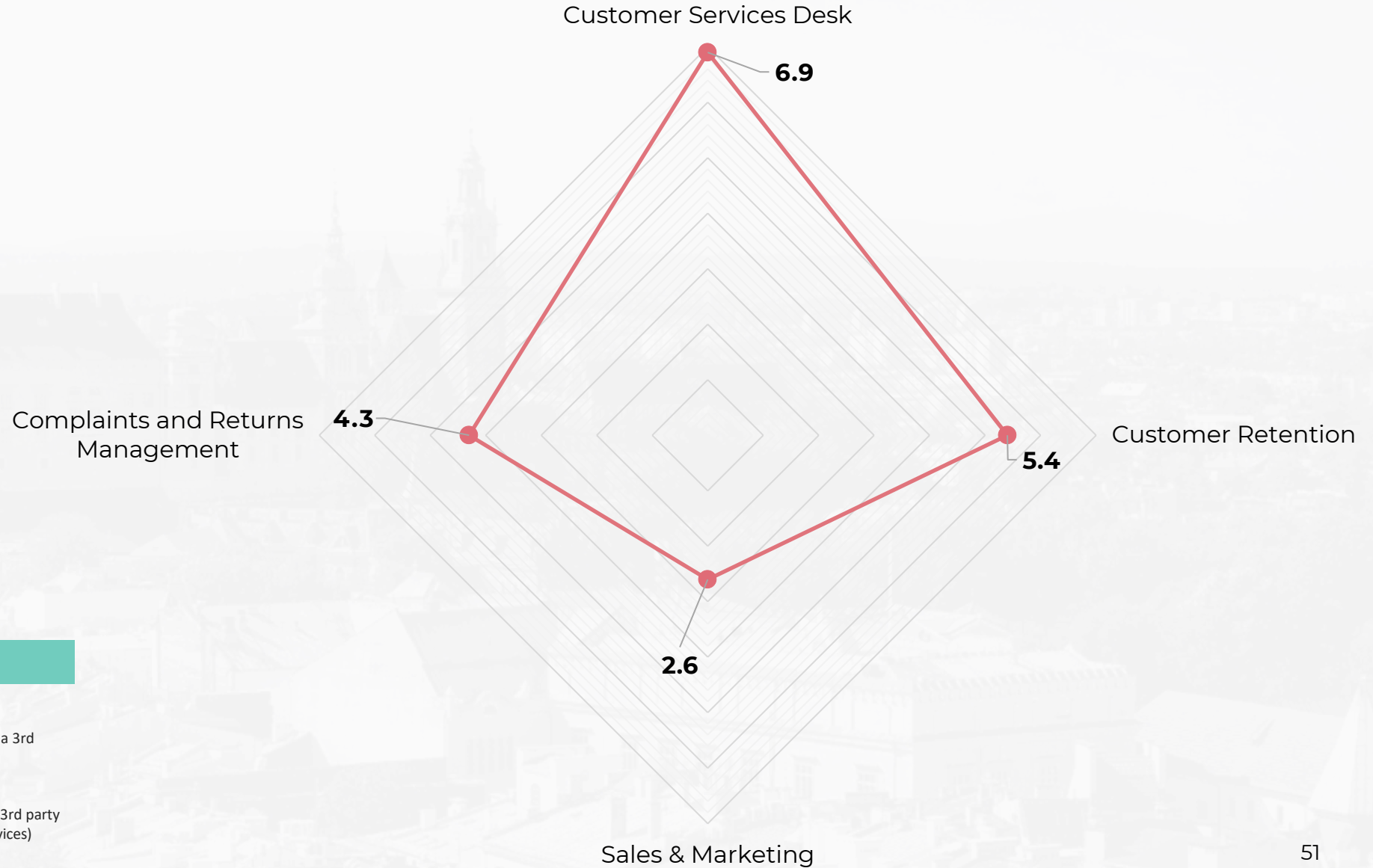


2022

2024

Service Delivery Lines

Level of concentration



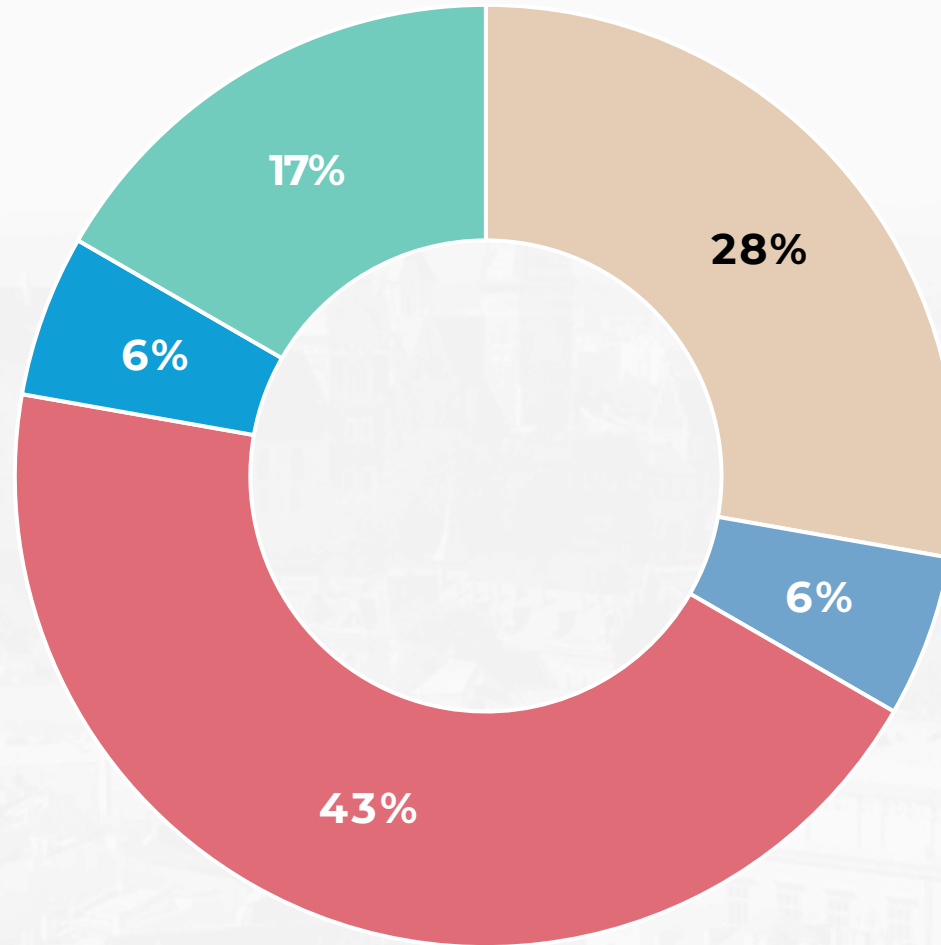
Concentration Index

Where:

- 0 - Service not provided
- 1-2 - Service provided to a very limited extent or only oversight of a 3rd party provider for the service
- 3-5 - Transition and consolidation of some processes
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Customer Service

% of capacity release last financial year per date of centre establishment



Is the role of the Global Process Owner located within your Customer Services Delivery pillar?

Yes, we have a Global Process Owner located in our centre

32%

Yes, partially

32%

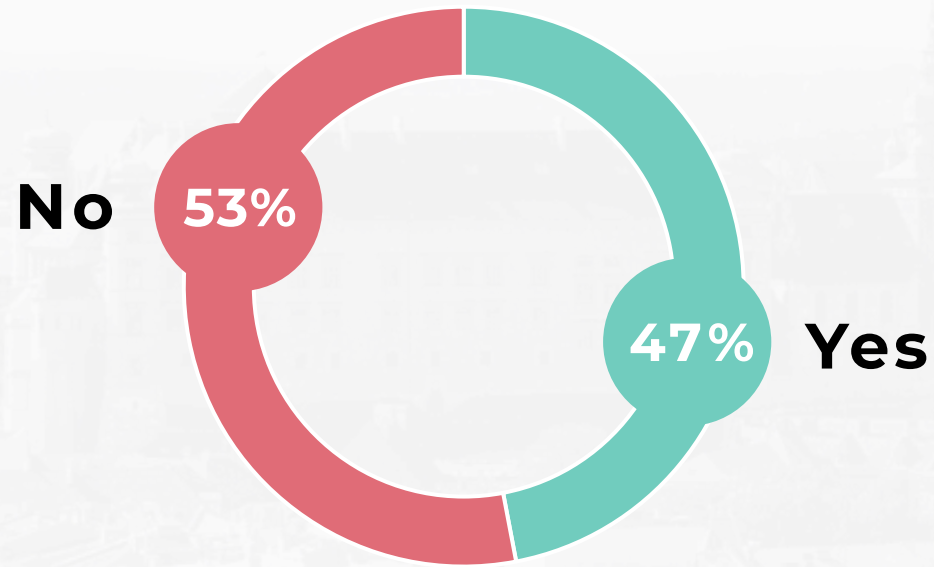
No, but there is a transfer plan in place

0%

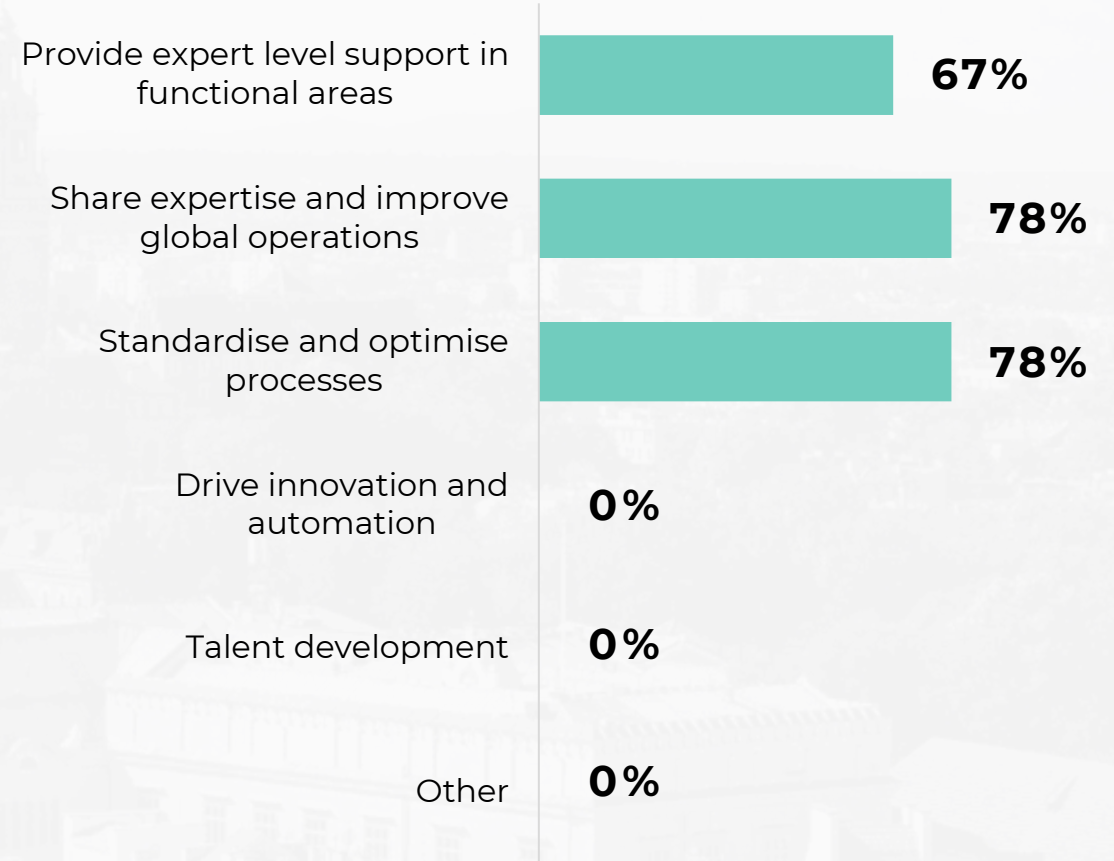
No, it is not planned at the moment

36%

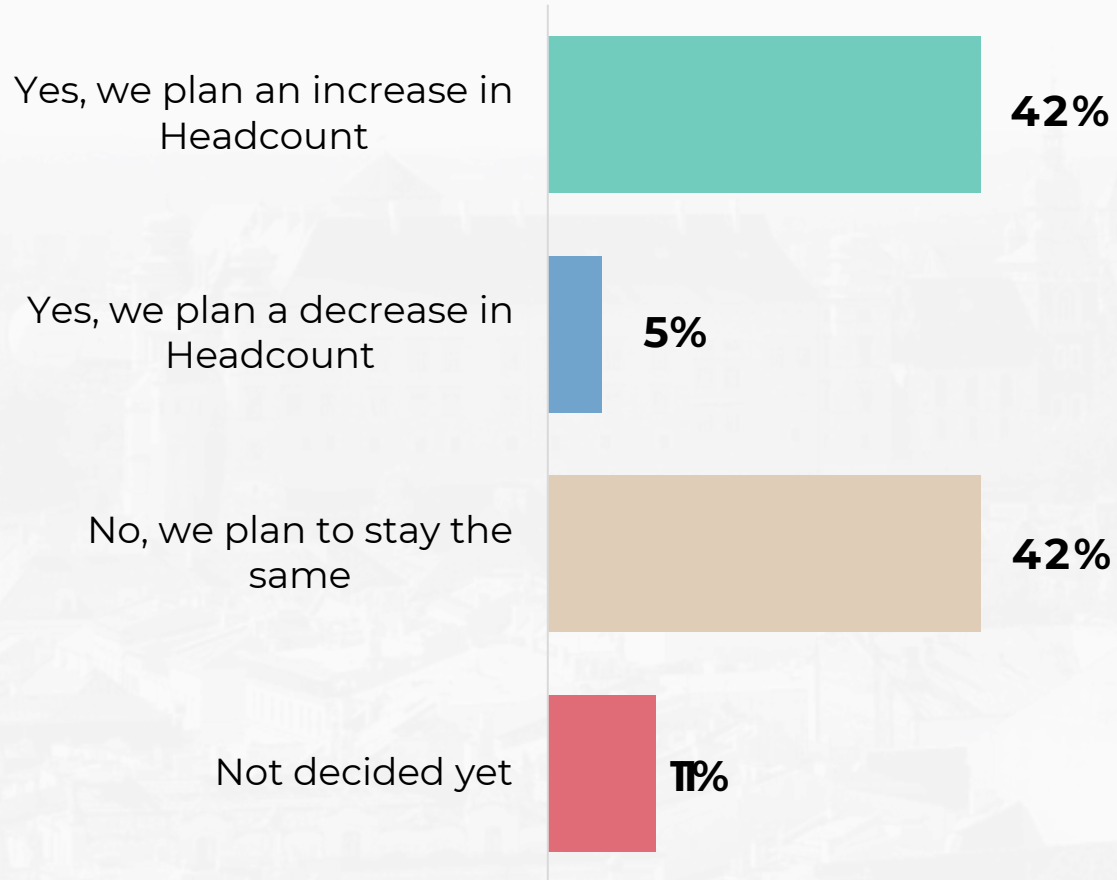
Do you **have a Centre of Excellence** in your Customer Services Delivery pillar?



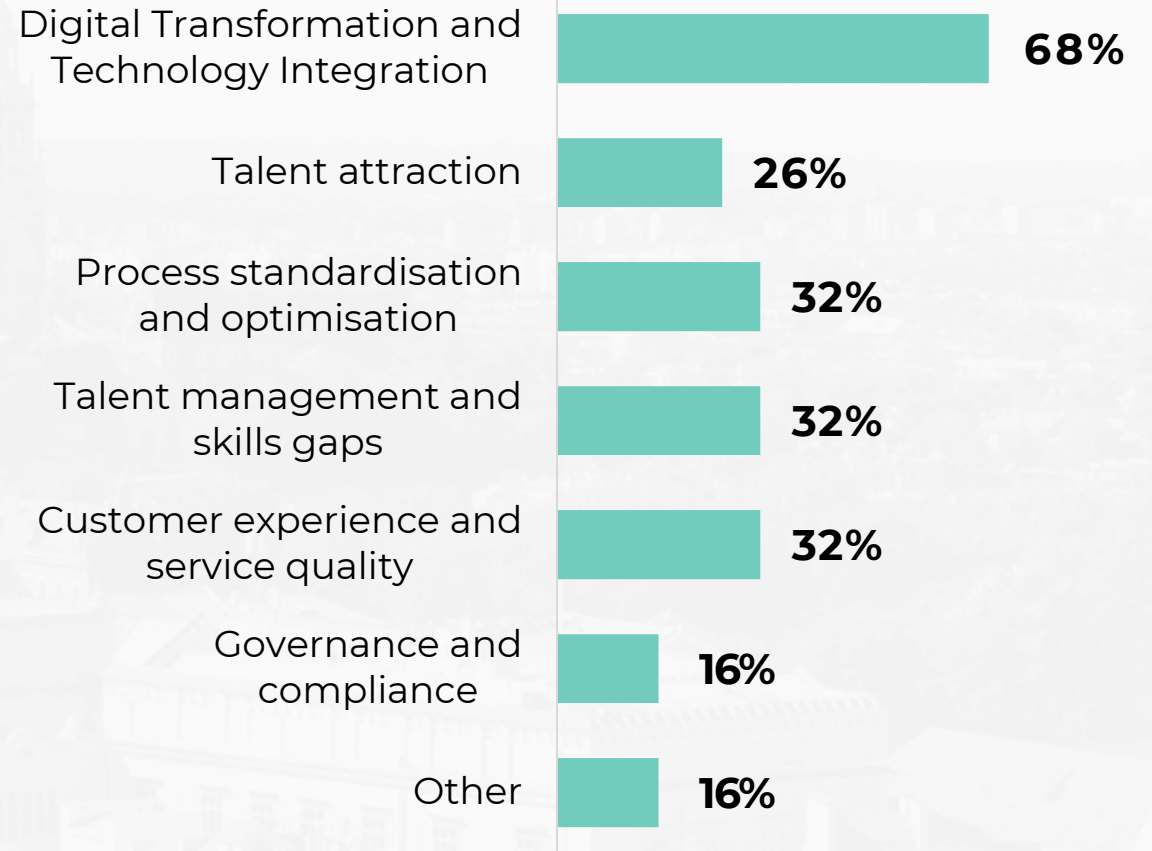
What is the **primary role** of the Centre of Excellence in your Customer Services Delivery pillar?



Are you planning a **change in headcount** in your Customer Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Customer Services Delivery pillar?

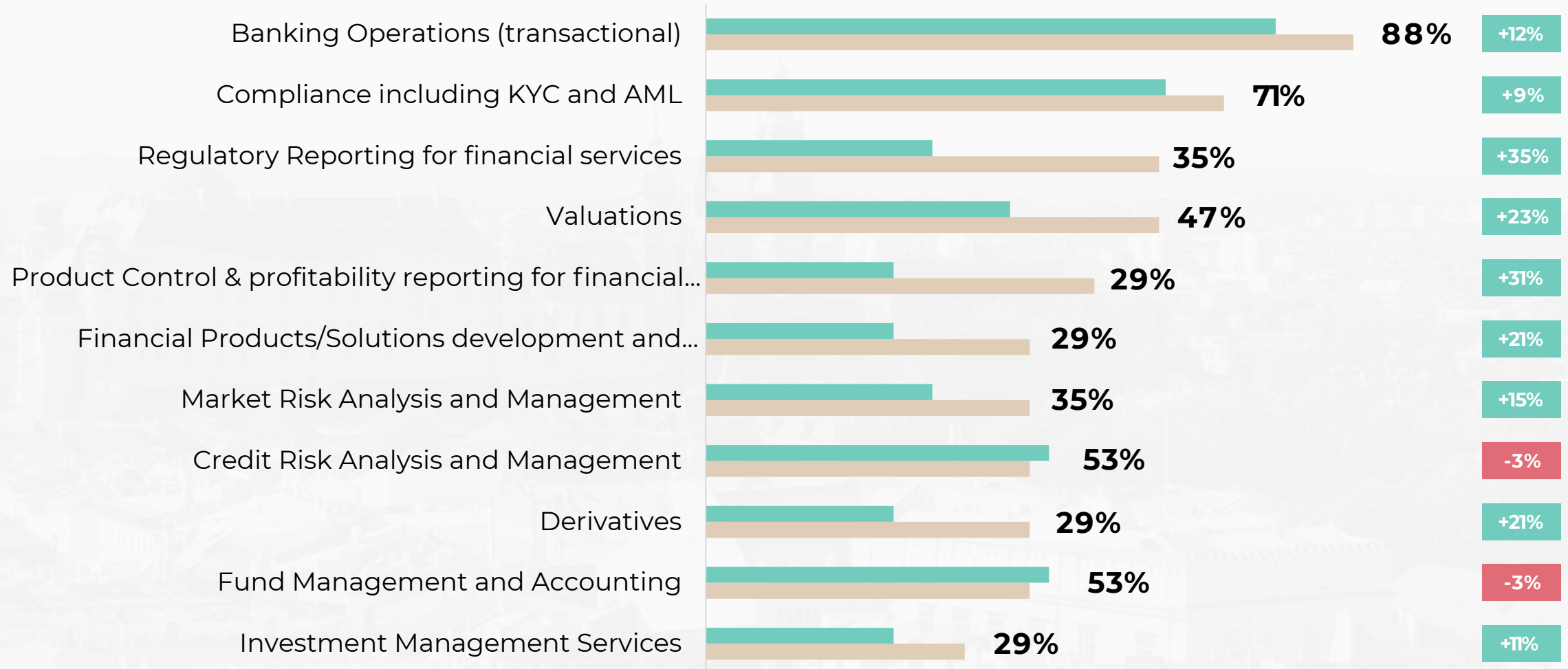




Financial Services

Financial Services

% of centres delivering a given service line

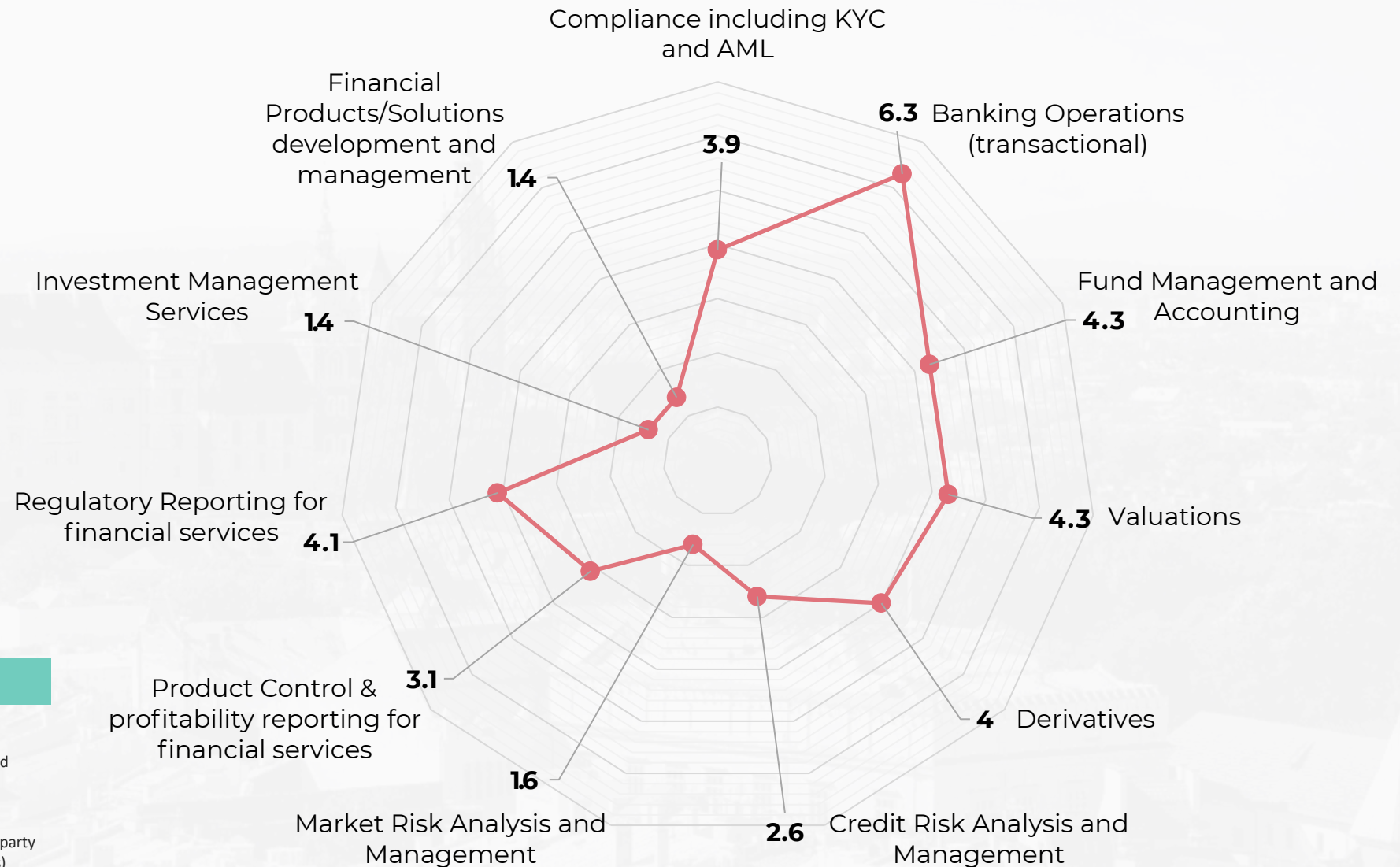


2022

2024

Service Delivery Lines

Level of concentration



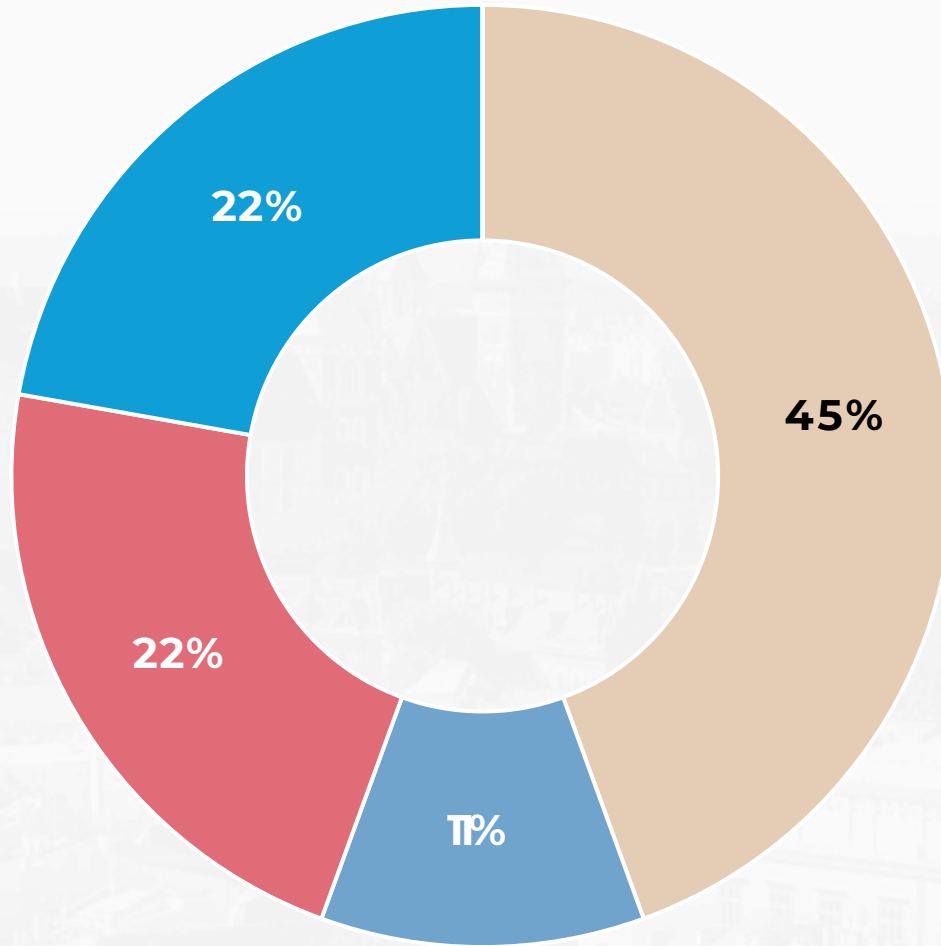
Concentration Index

Where:

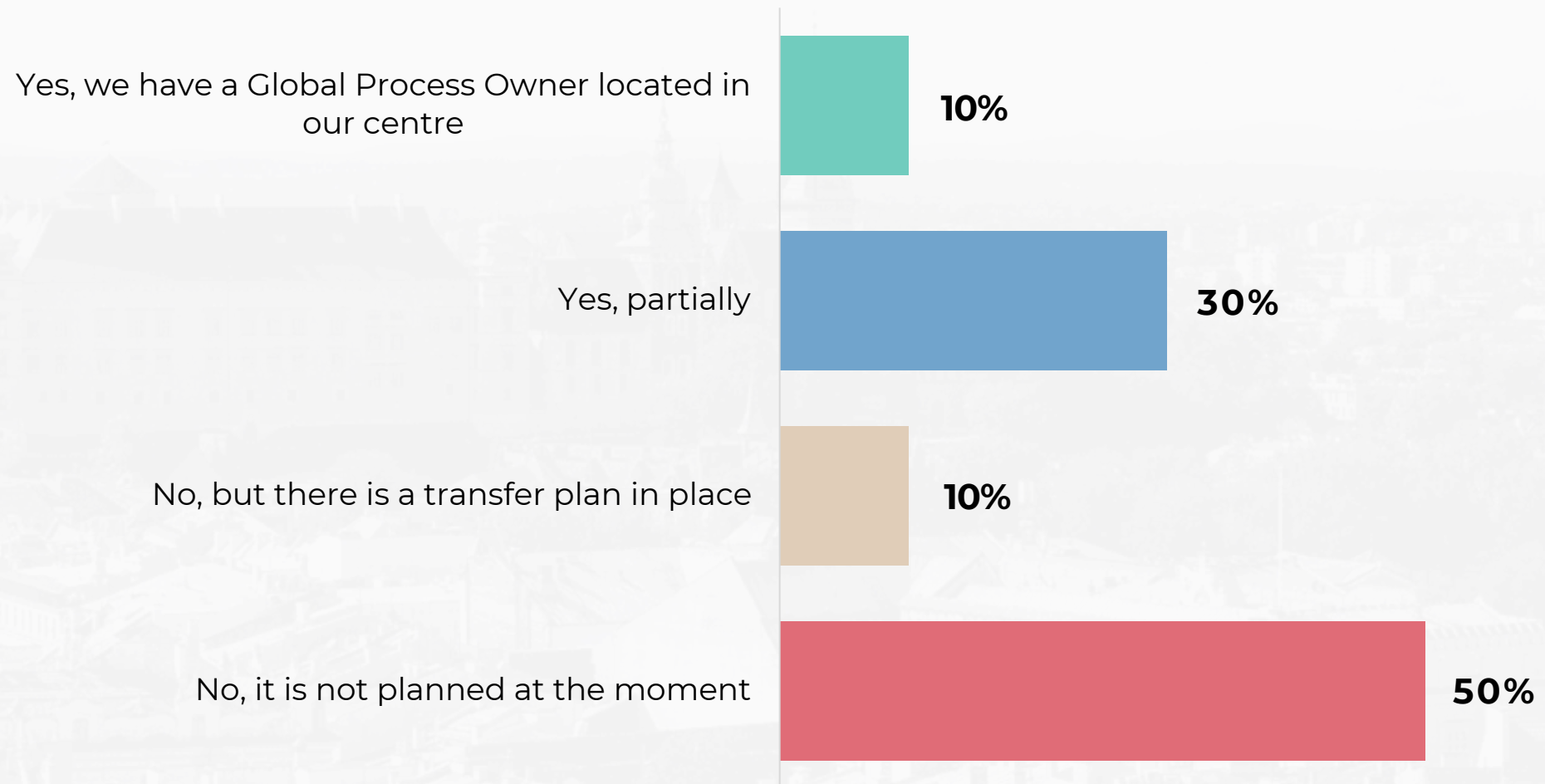
- 0 - Service not provided
- 1-2 - Service provided to a very limited extent or only oversight of a 3rd party provider for the service
- 3-5 - Transition and consolidation of some processes
- 5-9 - Considerable to full migration of all processes.
- 10 - Full ownership of the function (including management of any 3rd party outsourced functions and development of new processes and services)

Financial Services

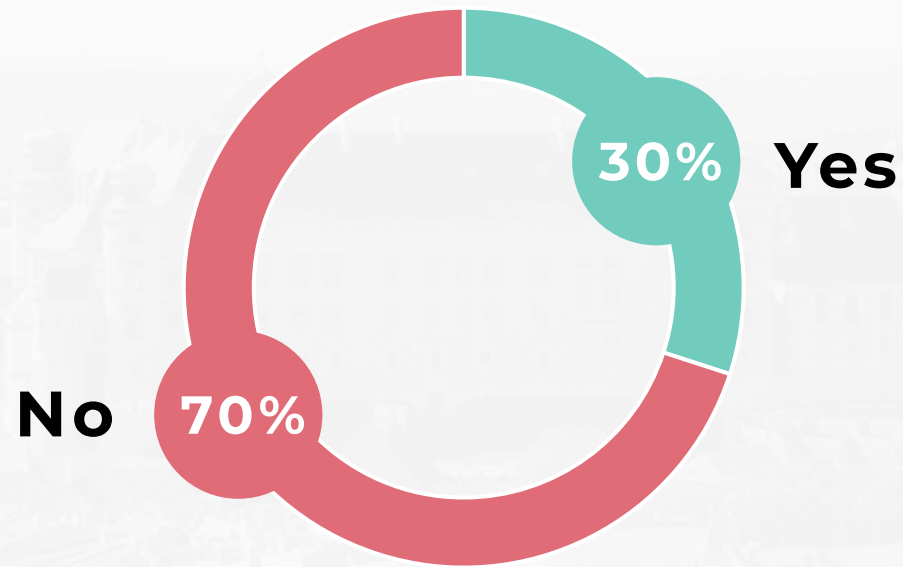
% of capacity release last financial year per date of centre establishment



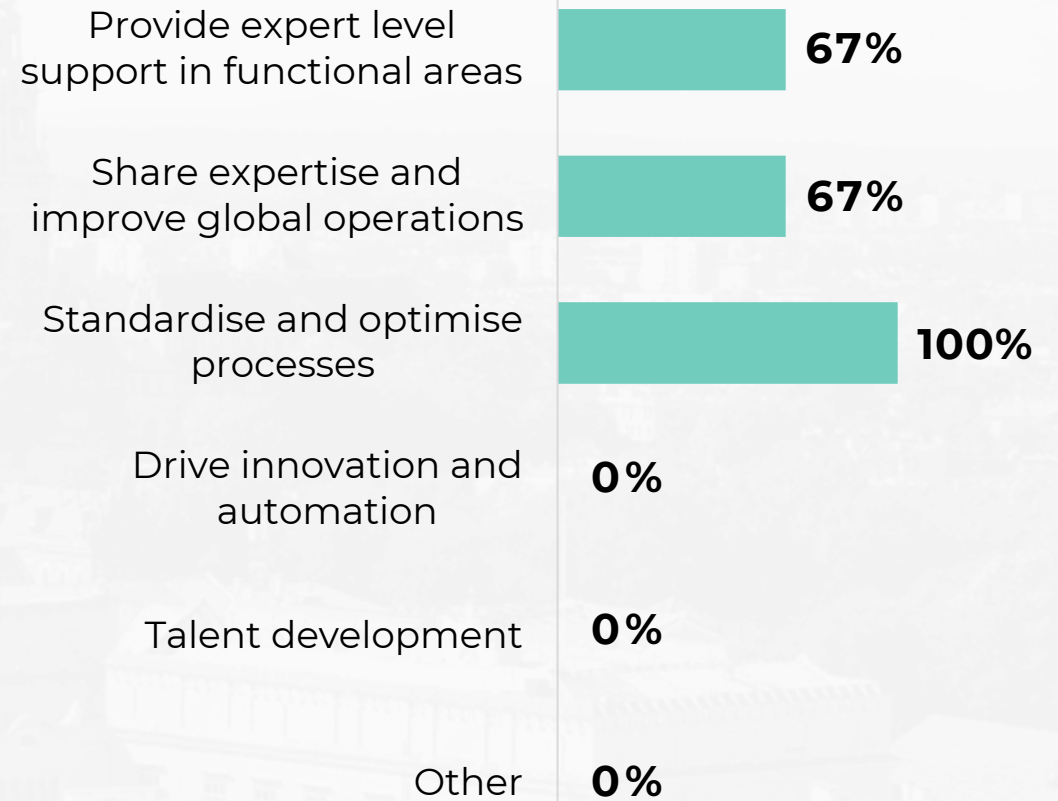
Is the role of the Global Process Owner located within your Financial Services Delivery pillar?



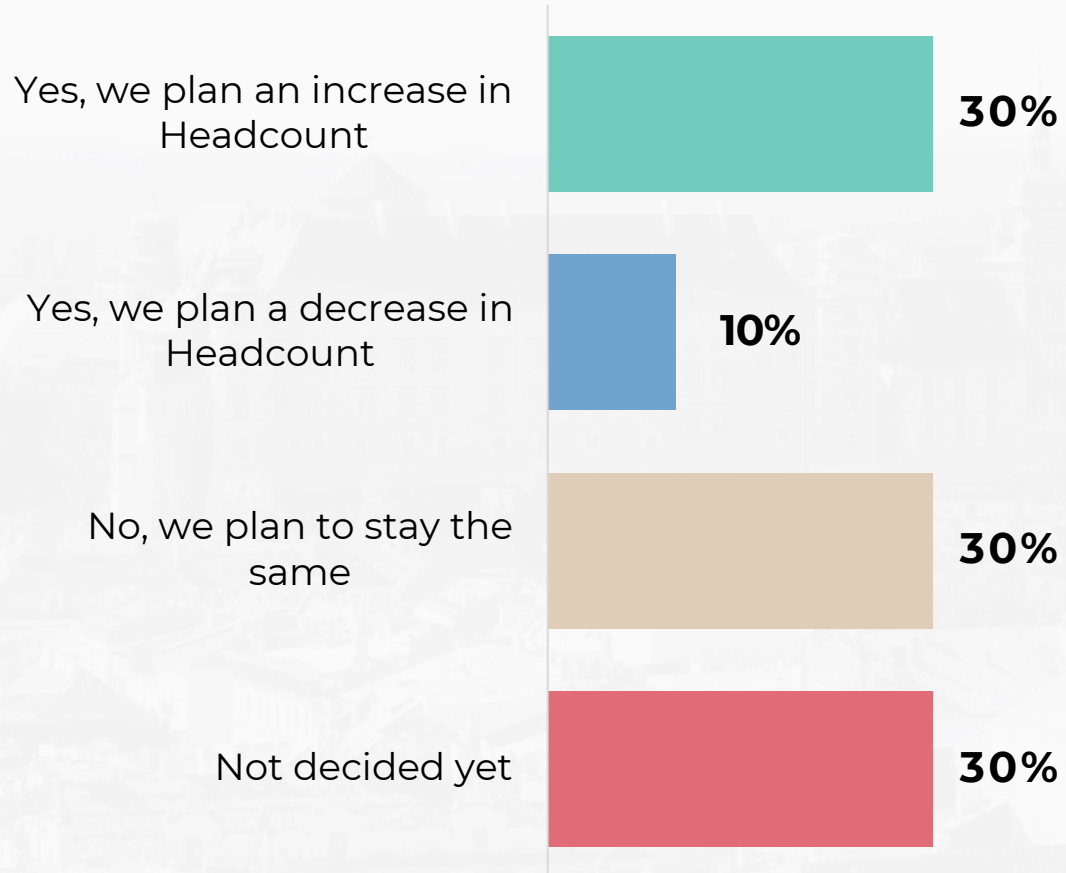
Do you **have a Centre of Excellence** in your Financial Services Delivery pillar?



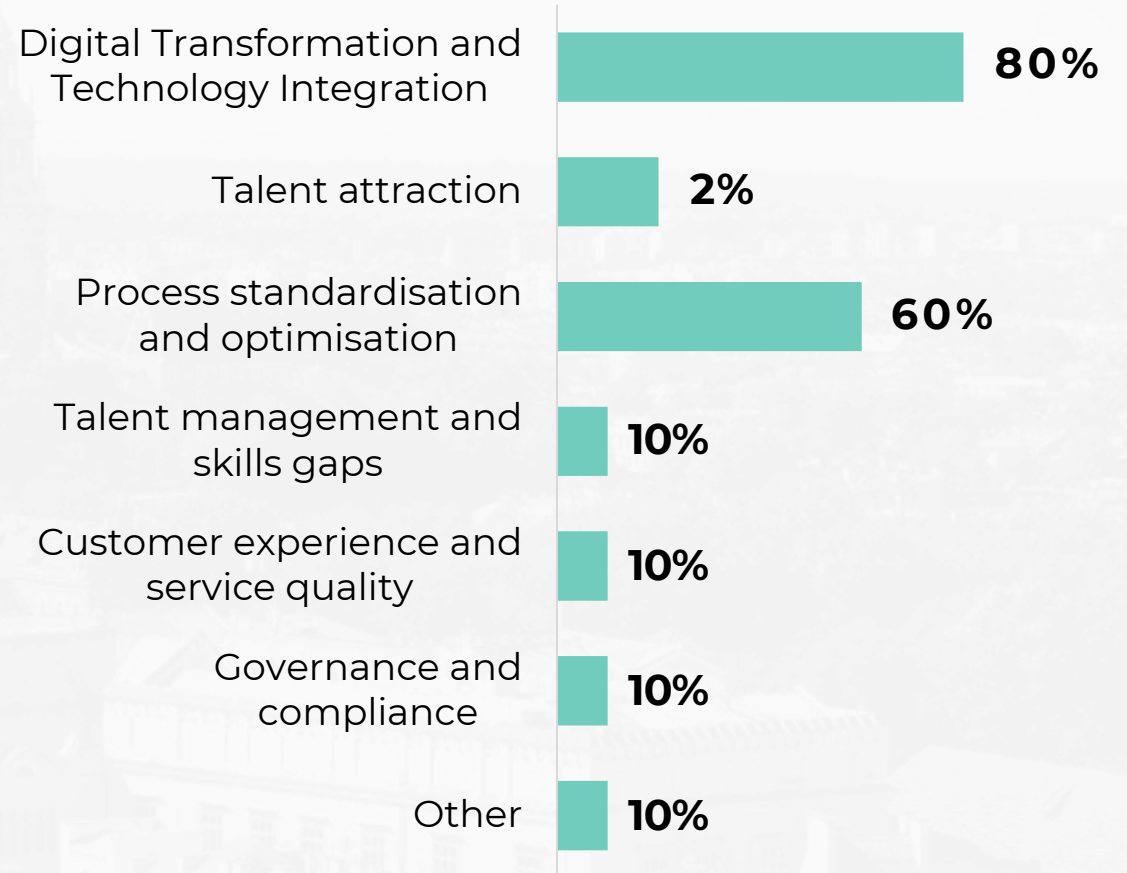
What is the **primary role** of the Centre of Excellence in your Financial Services Delivery pillar?



Are you planning a **change in headcount** in your Financial Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Financial Services Delivery pillar?





PROCESS TRACKER 2024

**Sales &
Marketing**

Sales & Marketing

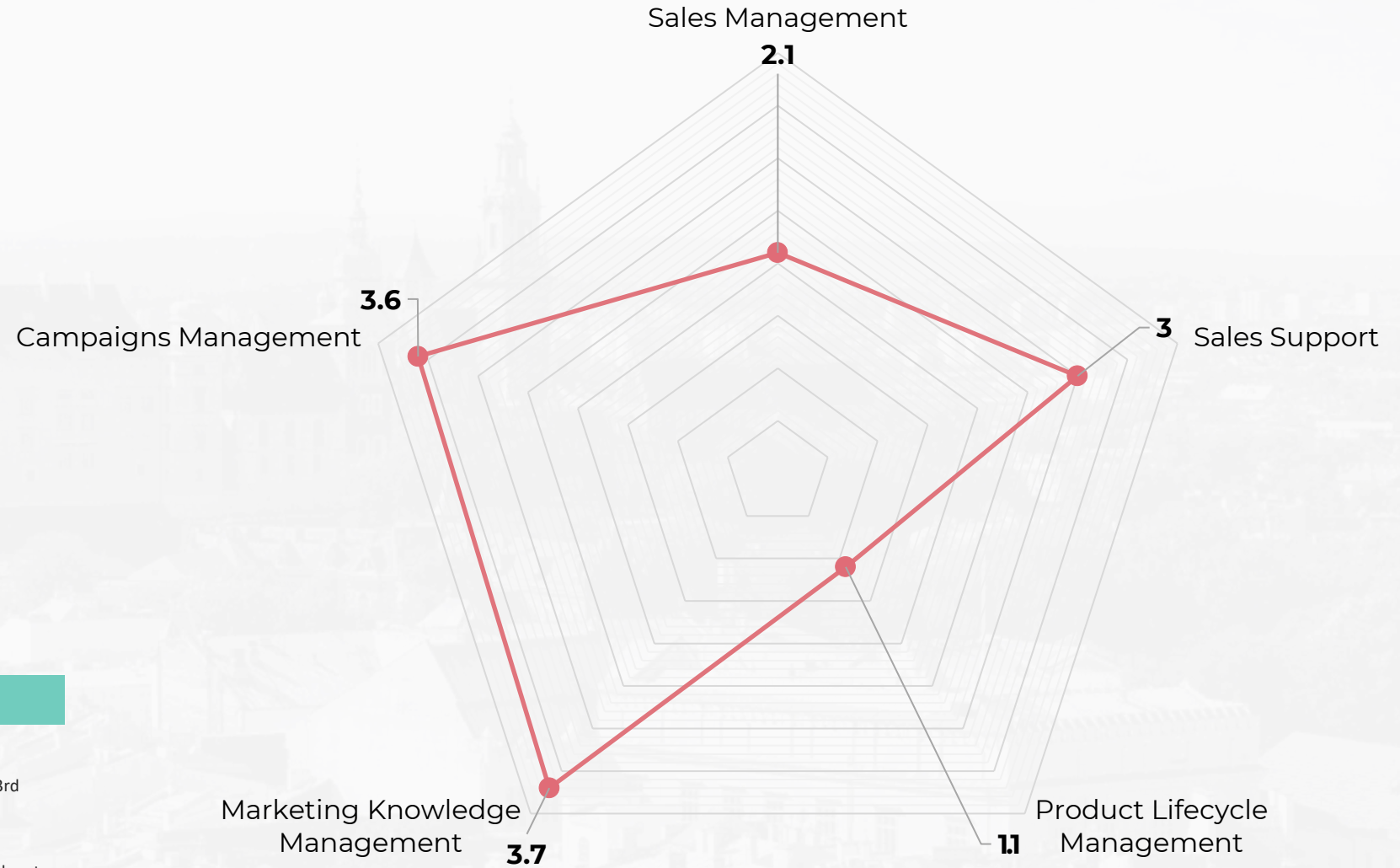
% of centres delivering a given service line



2022 2024

Service Delivery Lines

Level of concentration



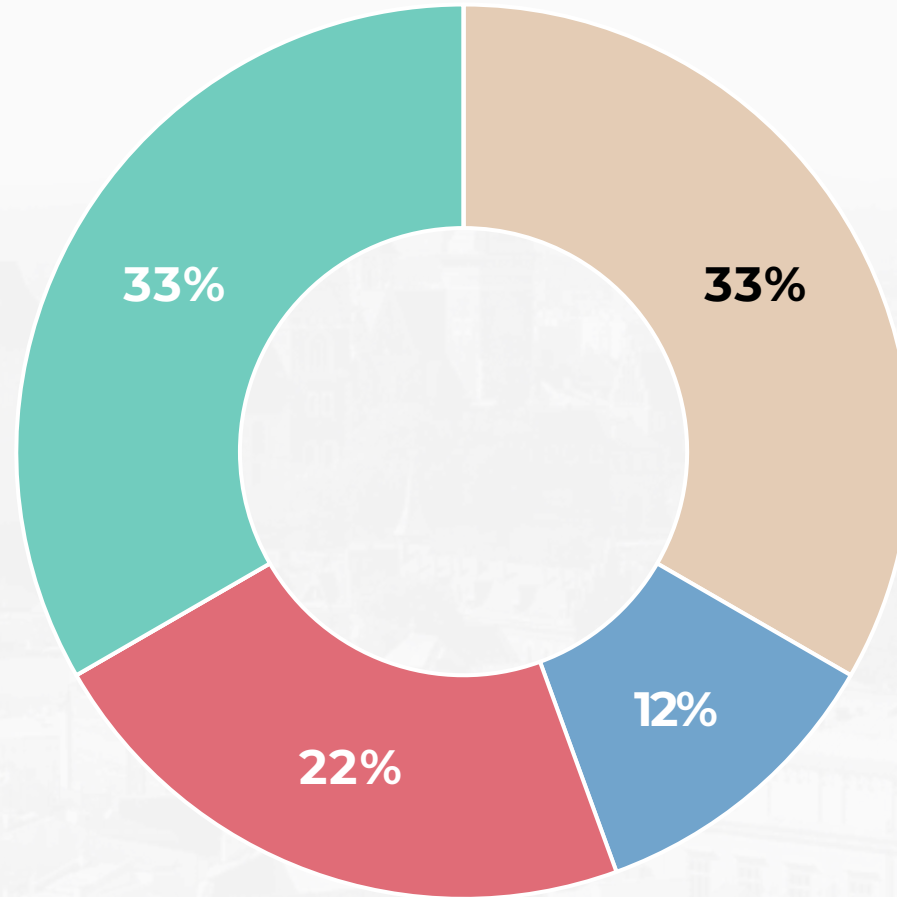
Concentration Index

Where:

- 0 - Service not provided
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Sales & Marketing

% of capacity release last financial year per date of centre establishment



Is the role of the Global Process Owner located within your Sales & Marketing Services Delivery pillar?

Yes, we have a Global Process Owner located in our centre

0%

Yes, partially

11%

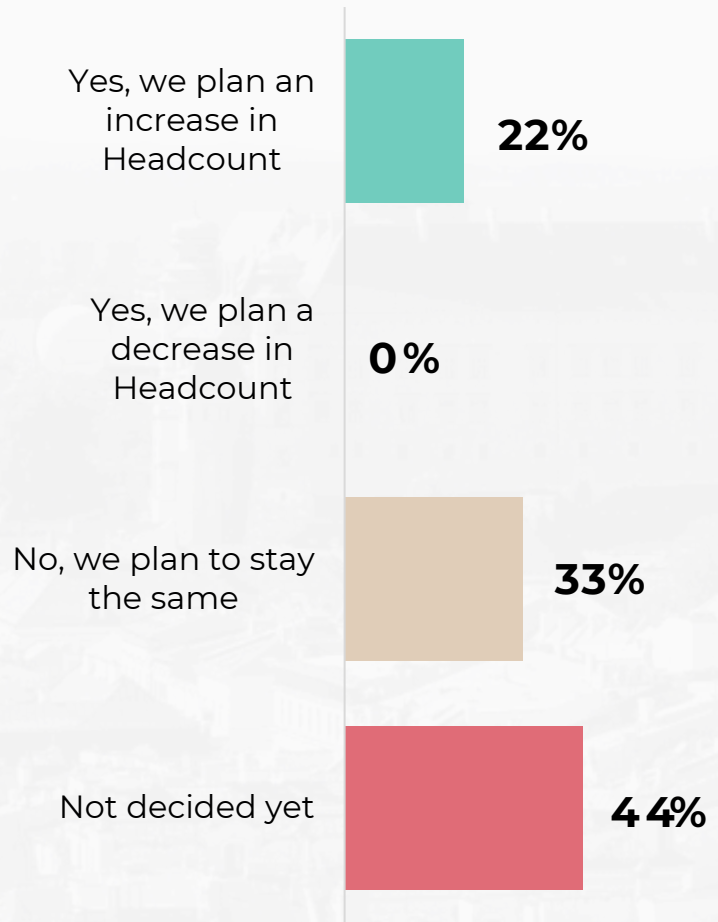
No, but there is a transfer plan in place

0%

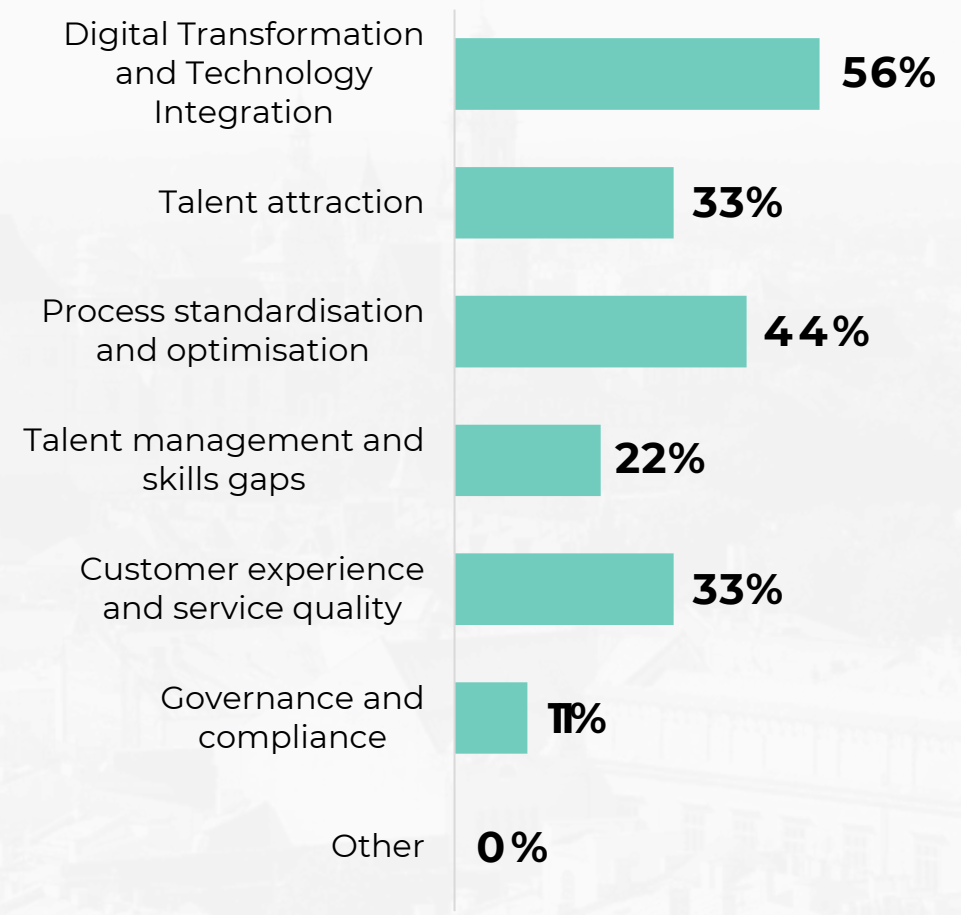
No, it is not planned at the moment

89%

Are you planning a **change in headcount** in your Sales & Marketing Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Sales & Marketing Services Delivery pillar?



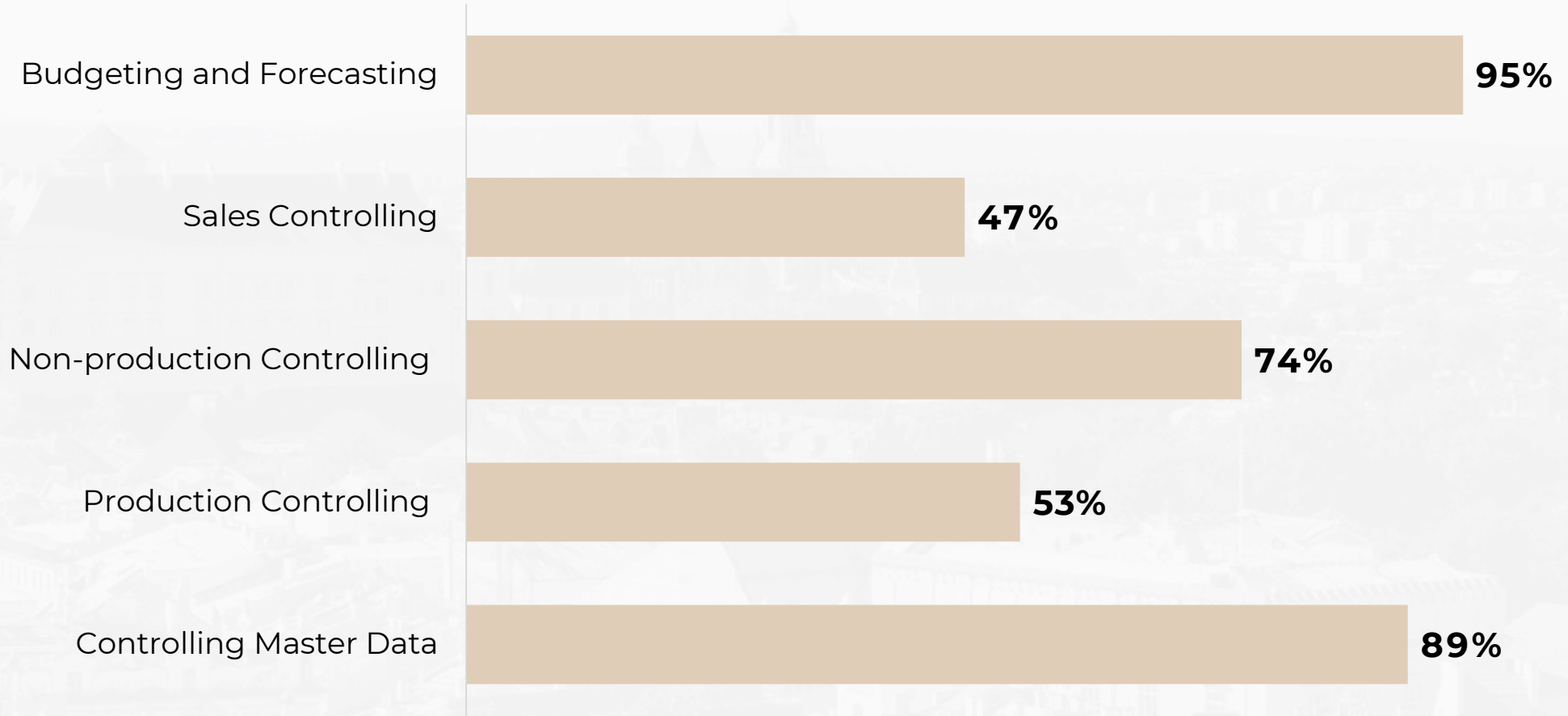
Do you **have a Centre of Excellence** in your Sales & Marketing Services Delivery pillar?



Controlling

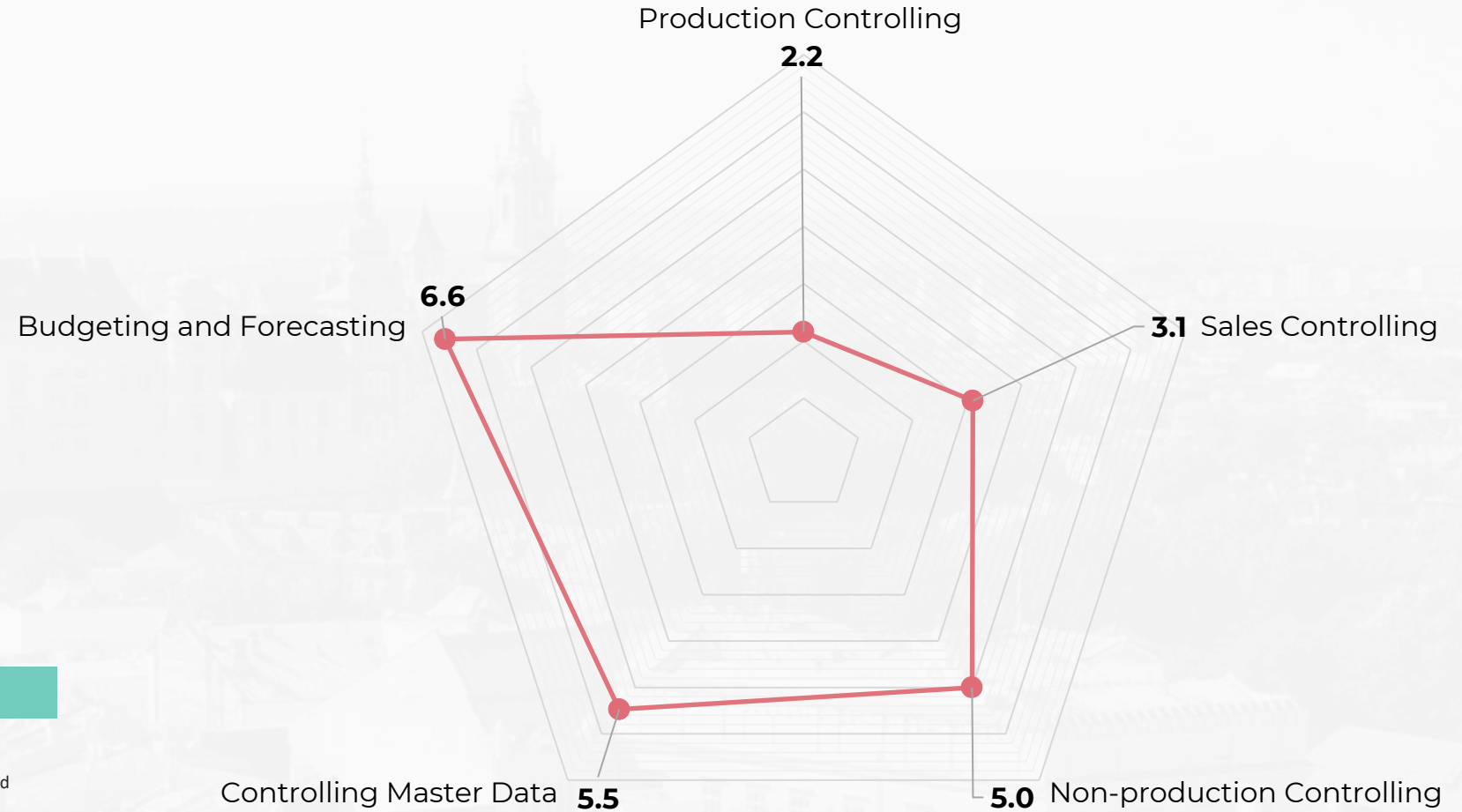
Controlling

% of centres delivering a given service line



Service Delivery Lines

Level of concentration



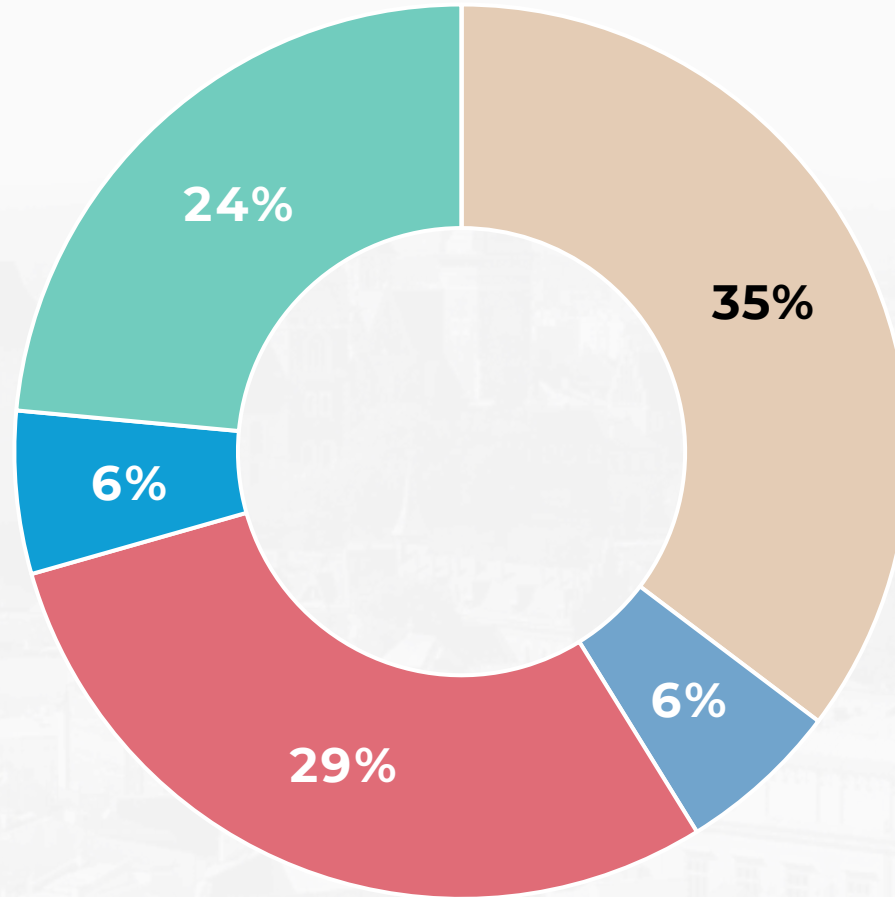
Concentration Index

Where:

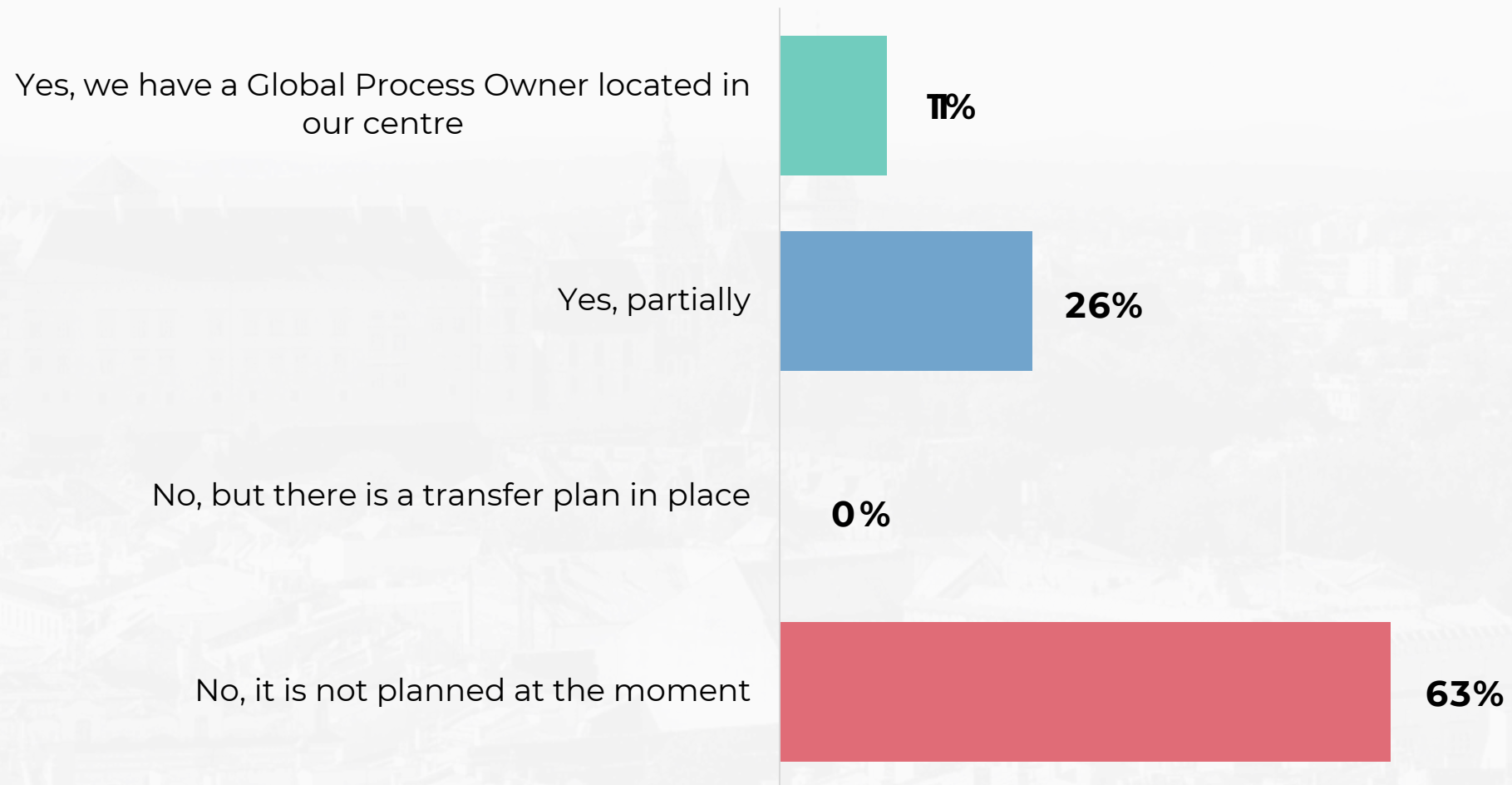
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Controlling

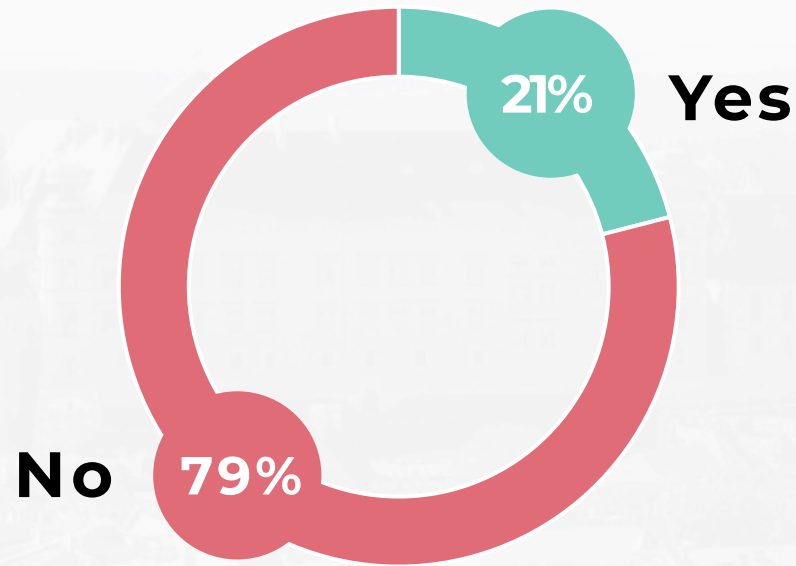
% of capacity release last financial year per date of centre establishment



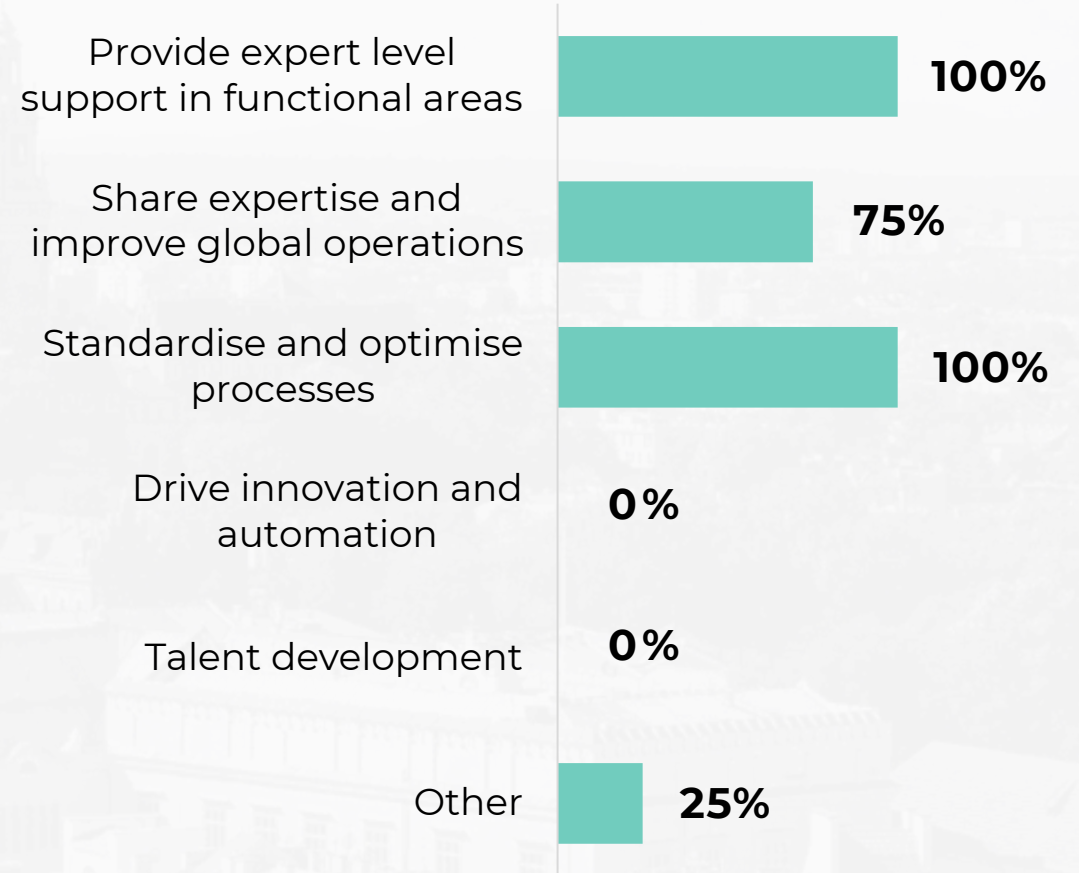
Is the role of the Global Process Owner located within your Controlling Services Delivery pillar?



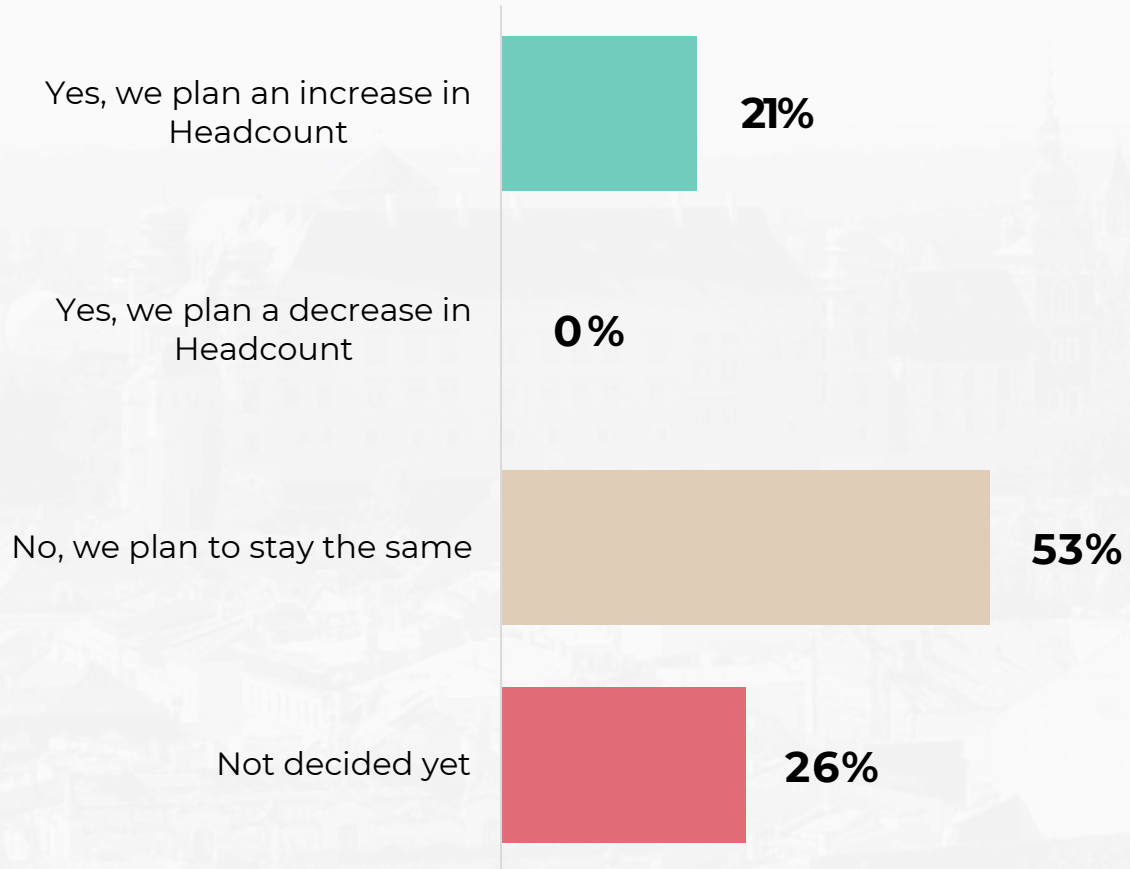
Do you **have a Centre of Excellence** in your Controlling Services Delivery pillar?



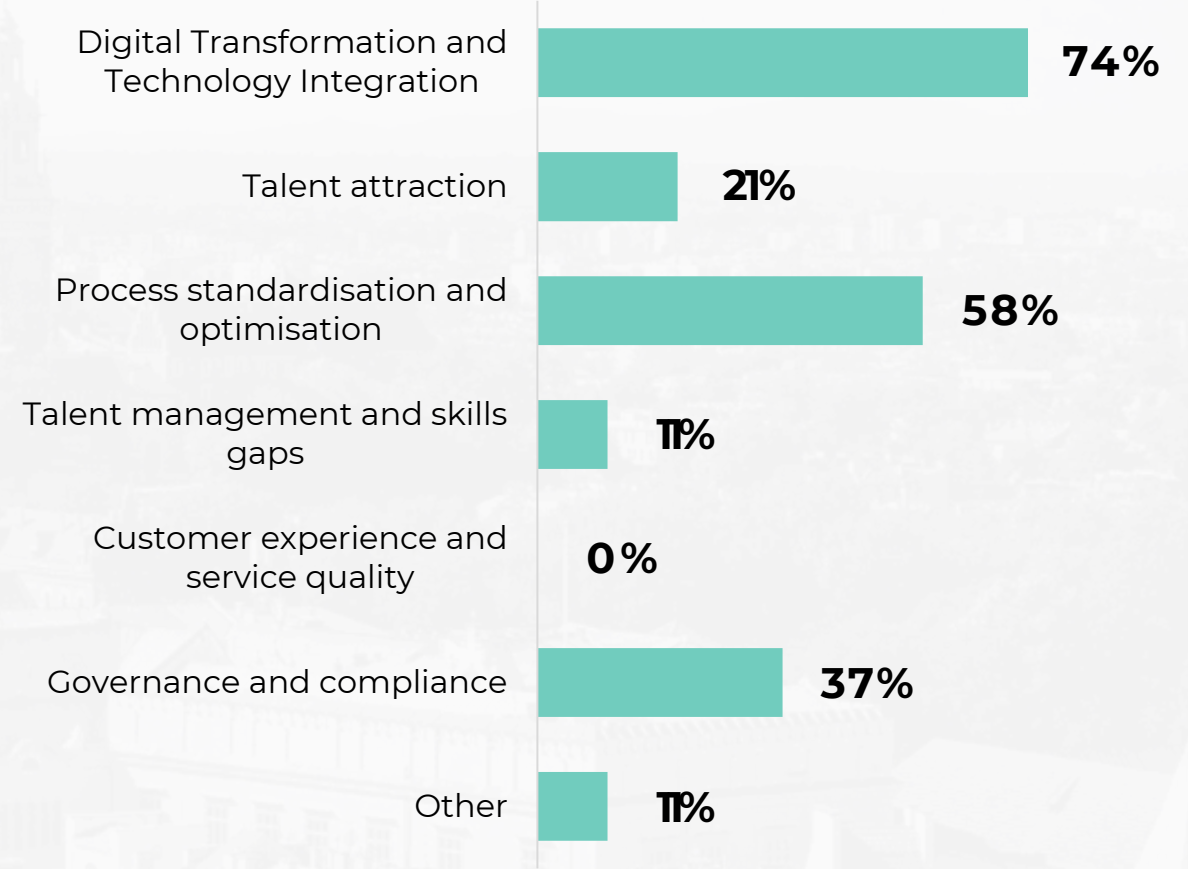
What is the **primary role** of the Centre of Excellence in your Controlling Services Delivery pillar?



Are you planning a **change in headcount** in your Controlling Services Delivery pillar over the next 12 months?



What are the **biggest challenges** in your Controlling Services Delivery pillar?



Thank you

PwC x ASPIRE



Participating Companies



abbvie



A|M|S



AON

ASSA ABLOY



BROWN BROTHERS HARRIMAN



HAYS

HEDGESERV



IAGGBS



Jacobs



N-iX



revvity



Sabre



sappi

tipico

