

# ¿Cómo han navegado los GBS la tormenta?

**JAVIER QUINTANA**

6 DE ABRIL

# Acerca de nosotros

## EY a nivel global y en Colombia

Países



>150

Oficinas en  
el mundo



728

Personas en  
el mundo



212.000

Personas en  
Colombia



1,300

EY es un líder global en servicios de aseguramiento, impuestos, transacciones y asesoría. Nuestra presencia internacional nos da la oportunidad de reunir el equipo multidisciplinario adecuado para sus necesidades, a partir de nuestra red global de profesionales.

En 1963 iniciamos operaciones en Colombia y contamos con oficinas en Bogotá, Cali, Medellín y Barranquilla.

En Colombia somos cerca de 1,400 profesionales de diferentes disciplinas, con una red internacional integrada con la cual proveemos soluciones globales. Tenemos un enfoque en diferentes sectores: Consumo Masivo y Retail, Gobierno, Energía, Servicios Financieros, entre otros.

Metodología global, con conocimiento y experiencia local.

### Nuestras líneas de servicio

**Asesoría Gerencial** (*Consulting*)

**Estrategia y Transacciones** (*SAT – Strategy and Transaction*)

**Aseguramiento/Auditoría** (*Assurance*)

**Impuestos** (*Tax*)





# Agenda

1

**La Nueva Normal – cómo están navegando los negocios**

2

**Los GBS en el nuevo orden mundial**

5

**Tendencias y factores de éxito hacia delante**

# Two years ago, uncertain and resilience ... and now what is next?

To protect the well-being of all stakeholders, support critical operations and restore market confidence, the C-suite must consider an **adaptive response across 3 time horizons**

## 1 N o w



Provide an immediate response to the crisis by protecting staff. Optimize cash and costs to withstand a prolonged disruption due to lockdowns

## 2 N e x t



Address liquidity challenges and develop a response plan to return business to original levels. Reassure stakeholders to restore market confidence

## 3 B e y o n d



Fundamentally change the operating model and prepare for sustainable growth. Engage with all stakeholders to ensure the success of your vision

Market Volatility

Earnings impact

Global Recession

Recovery

The New Normal

# 2022 – Global concerns and new conditions under the New Normal ...

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Mid 2021 set the transition and 2022 is the moment to act. Businesses and society look forward to shape the future and succeed

CEOs are resetting their strategies and reframing their investment focus for growth in a new environment.

M&A remains a critical strategic option to boost capabilities in technology, talent and innovation as well as ESG/sustainability strategies.

86%

of global companies recognized that **were impacted by the pandemic**

91%

Of respondents recognize changing decision criteria and **preferences of consumers**

59%

of CEOs foresee rapidly evolving and **more demanding regulatory requirements**

74%

of respondents will invest **in existing businesses, digital transformation, and sustainability**

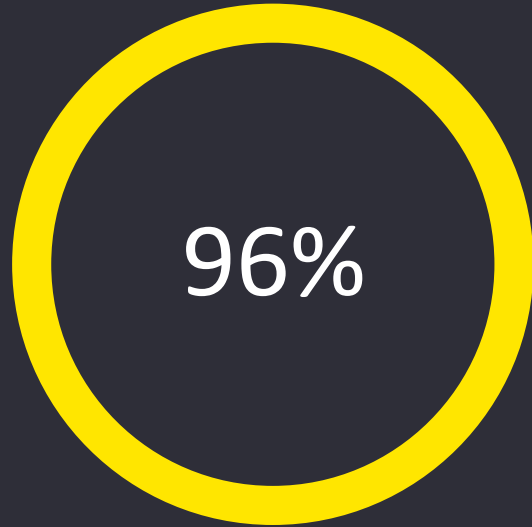
82%

of respondents identified **ESG factors as extremely** important or important, when it comes to strategic decision making

79%

of CEOs spend more time on **talent strategy** than just 5 years ago

# GBS has proven itself as a key pillar for the organization's resilience



96%  
of CEOs recognized high value from  
GBS organizations to overcome  
COVID19 challenges and support  
the business

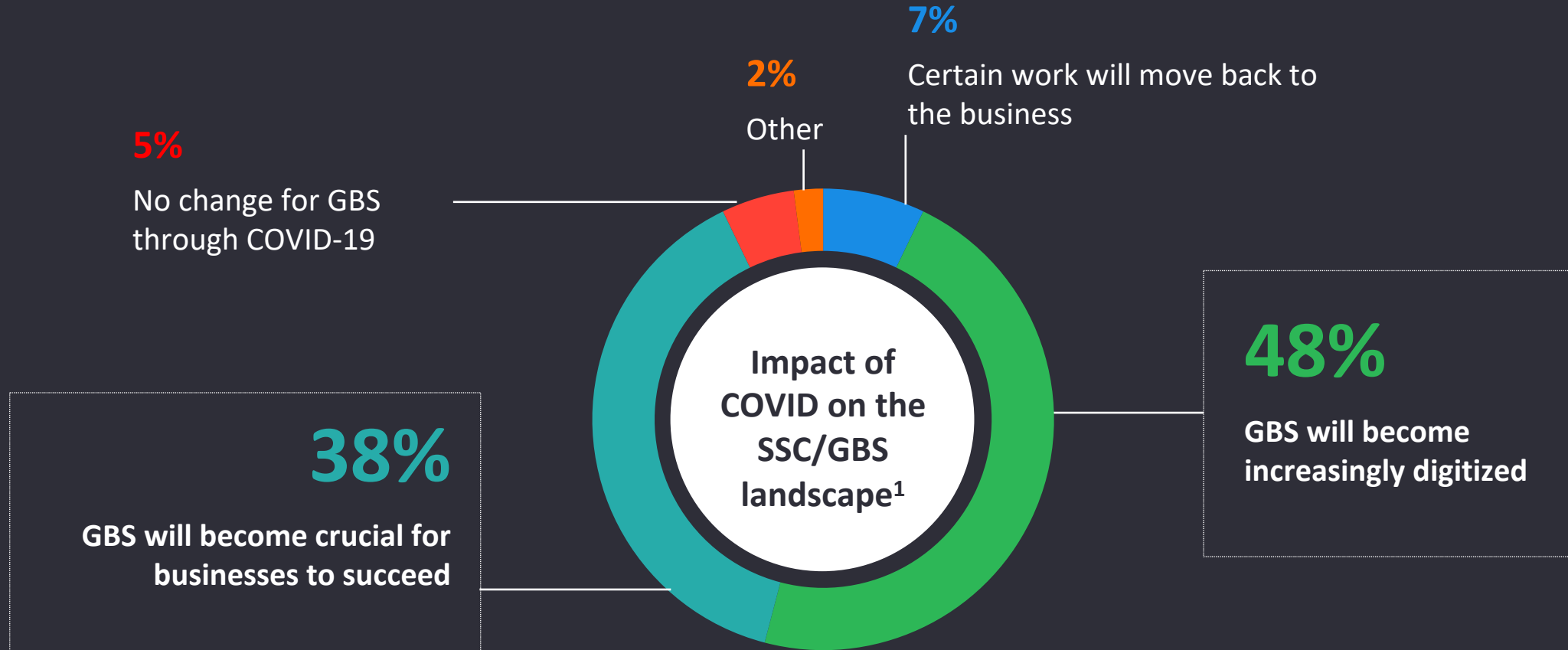
Only 1% reported a drop in productivity, versus 13% of organizations with no GBS whose productivity was impacted

For nearly 50% of the survey respondents, productivity was unaffected, and for 38% productivity actually increased

90% report scaled up the remote-delivery model with virtually no harming client-service experience or employee experience

For more mature GBS entities, the focus is likely to be around customer centricity and value delivery. For smaller, less evolved GBS organizations, performance will be the priority focus area.

# COVID-19 was the perfect storm to raise GBS expectations



**AND: More than 80% of CEOs intend to increase spend on technology modernization over the next 12 months (EY CEO Survey 2021)**

1. Source: EY-SSON EY Transformation Realized 2021





## La perspectiva del Dr. Carlos Mario Giraldo, presidente Grupo Exito

En la crisis derivada de la pandemia, cuáles fueron las principales contribuciones del CSC de Grupo Éxito para su negocio?

En un mundo Post-Covid, qué espera de su CSC como contribución para ser exitoso en su negocio?



▶ Video 1

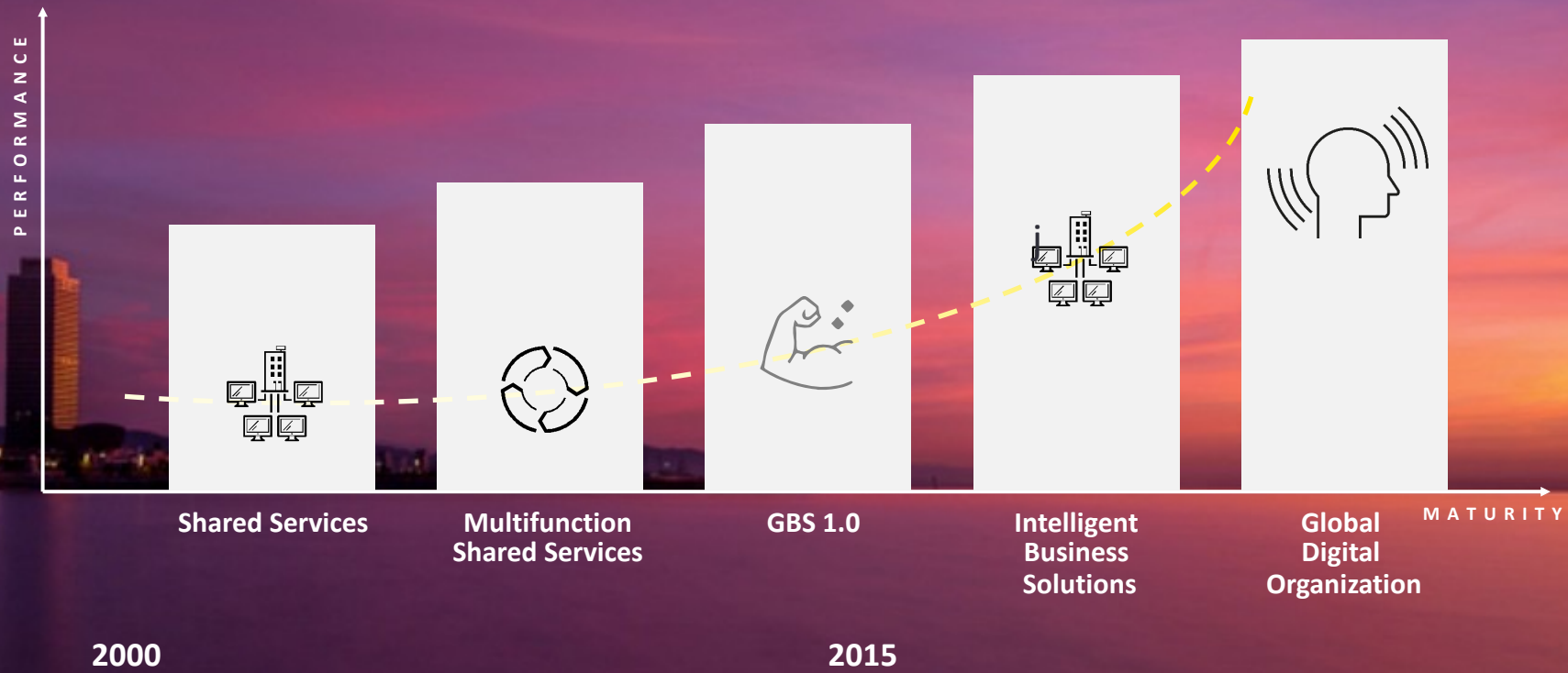




## Feed for the Future

from  
“GBS **serve** the business”

to  
“GBS **are** the business”



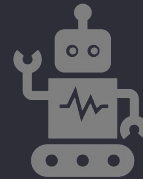
# GBS evolution - How is the GBS industry evolving?

GBS are transforming to become Global Value Organizations. To do so, new thinking is required...



## PAST

- Single-function shared services become multi-function GBS operations
- SSC industry explodes and consolidates into large volume delivery centers
- Country and BU SSCs start to become regional and enterprise-wide
- BPO leads the way for 3-tier delivery models. Enabling tools and technology prevail



## PRESENT

- On-going increase in process and service footprint
- A shift to value-add whilst maintaining cost focus
- End-to-end processes start delivering on standardization promise
- Robotics experiments augment the automation continuum
- Design thinking redefines the experience imperative
- Fintech's start disrupting delivery models



## FUTURE

- GBS as Digital HUB and focus on performance
- It will begin to shift radically to increased digitalization
- It will focus much more on delivering value
- And it will push forward the organization's efforts to be more customer centric

*Value generation and aggregation vs cost focus      Data as an asset*

*Industry wide clearing houses*

*Diverse and distributed workforce with generational shifts*

Shared Services

Global Business Services

Digital GBS / Global Value Organization



# GBS evolution - How is the GBS industry evolving?

GBS are transforming to become Global Value Organizations. To do so, new thinking is required...



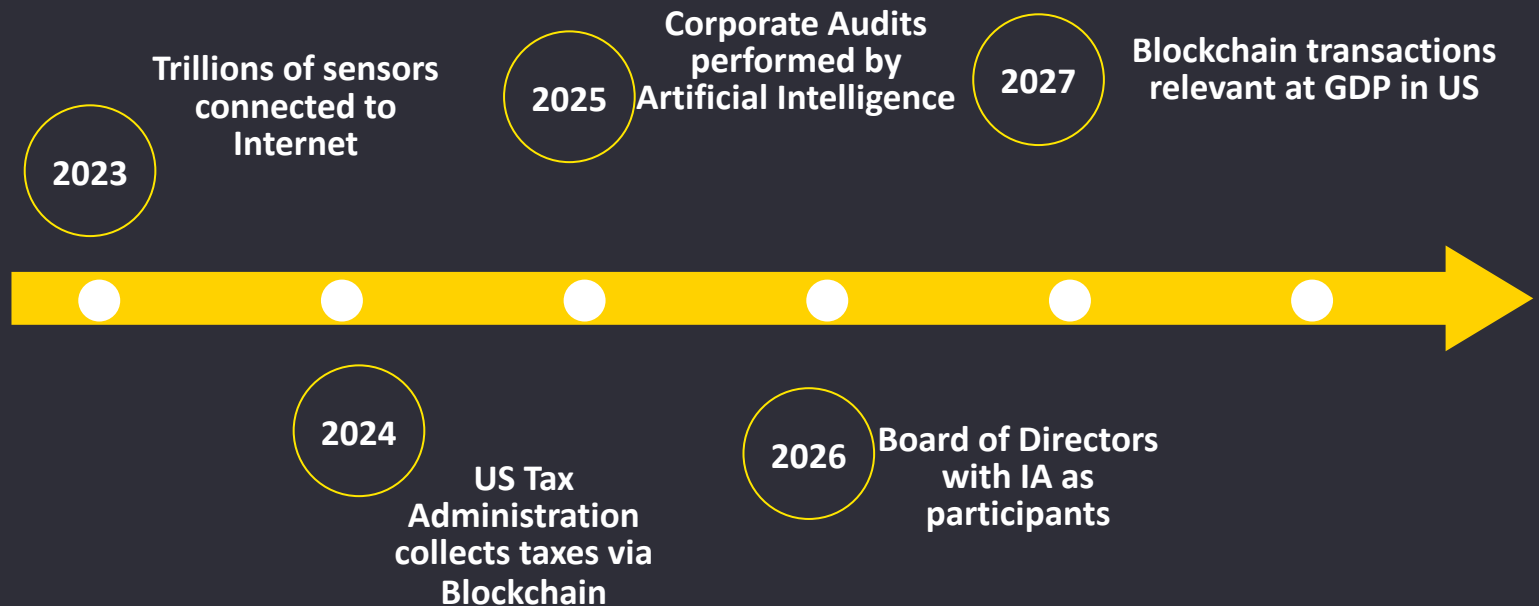
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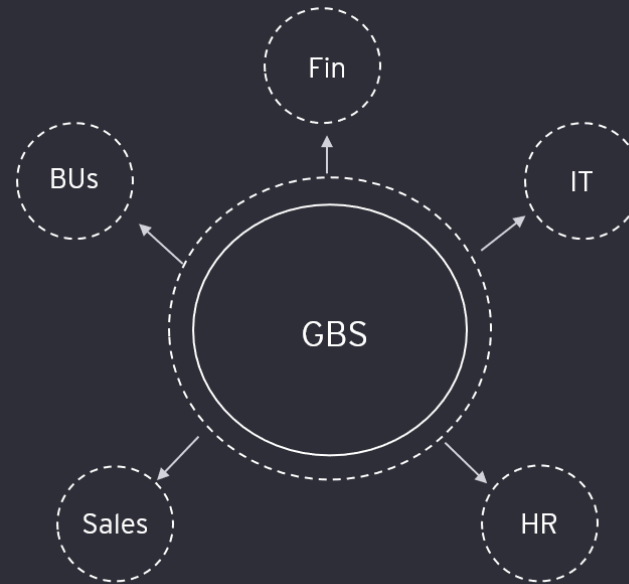
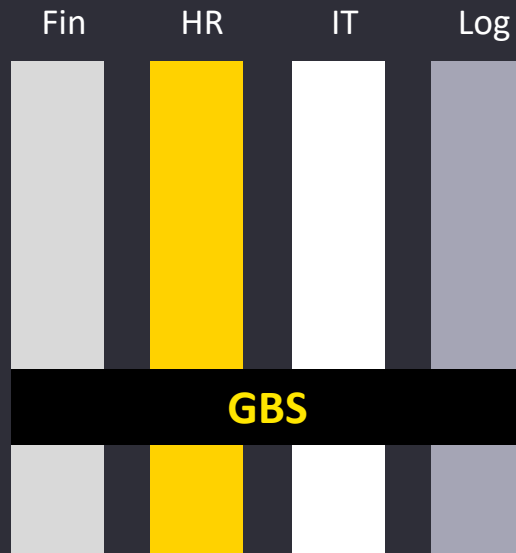
*Industry wide clearing houses*

*Diverse and distributed workforce with generational shifts*



When GBS should start the journey to support the future?

# GBS expectations from businesses ... evolution



## Experience

- Personalization
- Accessibility
- Collaboration and engagement



## Speed

- Agility
- Standardization and integration
- Digital enablers



## Insights

- Data and information availability
- Proactive decision making
- Creativity and innovation

From Back Office ...

- ▶ Transaction Processor
- ▶ Support
- ▶ Headcount Focus
- ▶ Administrative

to ... GBS as Business Unit

- ▶ Offer transformation as a service
- ▶ Access top talent with new workforce structures
- ▶ Insight Generator through analytics
- ▶ Innovation and integration focus
- ▶ Cool career

# Key capabilities to be built and become a true game changers in a Post-Covid world

## #1

### GBS Digital Evolution

- Automation and machine learning will continue as a key focus area for GBS
- 90% see an increasing demand for Digital E2E
- Human and Technology interoperability is a fact
- Incremental IA in GBS operations is the target, but capabilities are not clear yet

## #2

### Advance Service Offerings

- 86% of GBS Leaders rate ASO relevant in the future, but only 21% feel confident on current capabilities
- 57% plan to build out of in company-wide insights and over the next three years
- Specialized and digital recruiting (32%) and steering digital initiatives services (38%)

## #3

### Future-oriented set up

- New GBS operating models must enable innovation and collaboration
- 90% are pushing to set Digital and Innovation Centers of Excellence (CoE)
- 20% feel prepared to set or run that networks effectively
- Work with 3<sup>rd</sup> parties and vendors is crucial

## #4

### Talent and new ways of working

- Reactivating the creative gene
- Plan for the new labor market place
- 100% feel remote working to be relevant
- But only 40% feel confident to have agile ways of working and lead people successfully
- Talent development will be complemented by IA



# #1 – GBS Digital Evolution

GBS must work in 3 streams ...



## Become Digital

- ▶ Digital E2E Value Chains and transform GBS operation to enable Agile
- ▶ Digital and Innovation CoE
- ▶ Digital Talent
- ▶ Automation intelligence



## Enable Digital

- ▶ GBS as digital engine for businesses – Digital Factory
- ▶ Digital and Analytical Services
- ▶ Digital Innovation as a Service
- ▶ Self-management services enabled



## Support Digital

- ▶ CoE enabled to Support improvement of digital
- ▶ Digital Customer Service
- ▶ Collaboration with Third Parties
- ▶ Measurement and Improvement



# #1 – GBS Digital Evolution

Although the impact of digital in GBS will be significant ... the journey is starting for many ...

**96%**

Of GBS leaders think that digital transformation will change how GBS operations are performed in the next 3 – 5 years

... however

**52%**

Think that companies and GBS already have an integral Digital Strategy in place ...

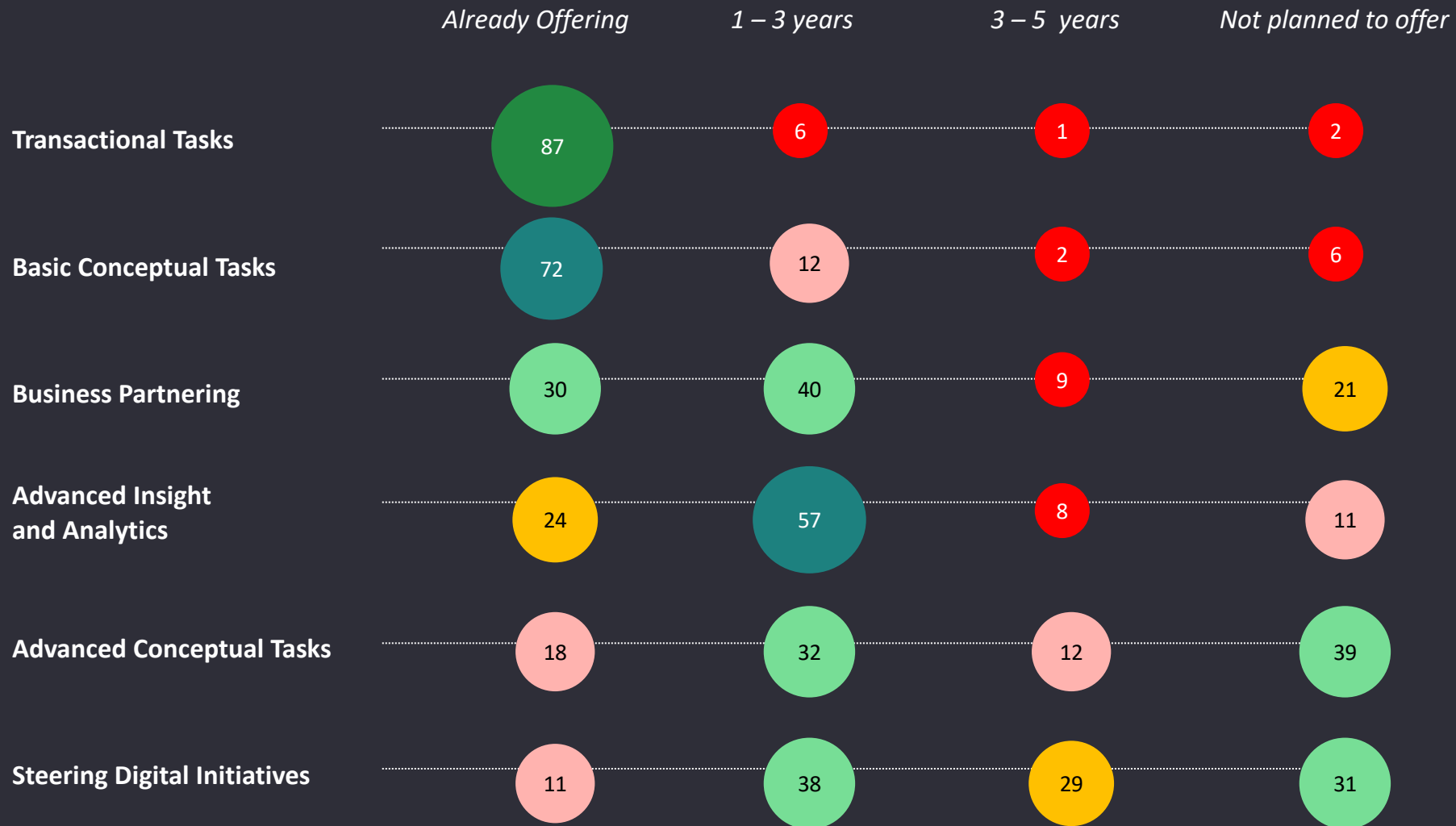
... and just

**39%**

Feel that already got talent, resources and skills in place to execute a strategy ...

## #2 – Advanced Service Offerings

GBS service offering will change over the next few years



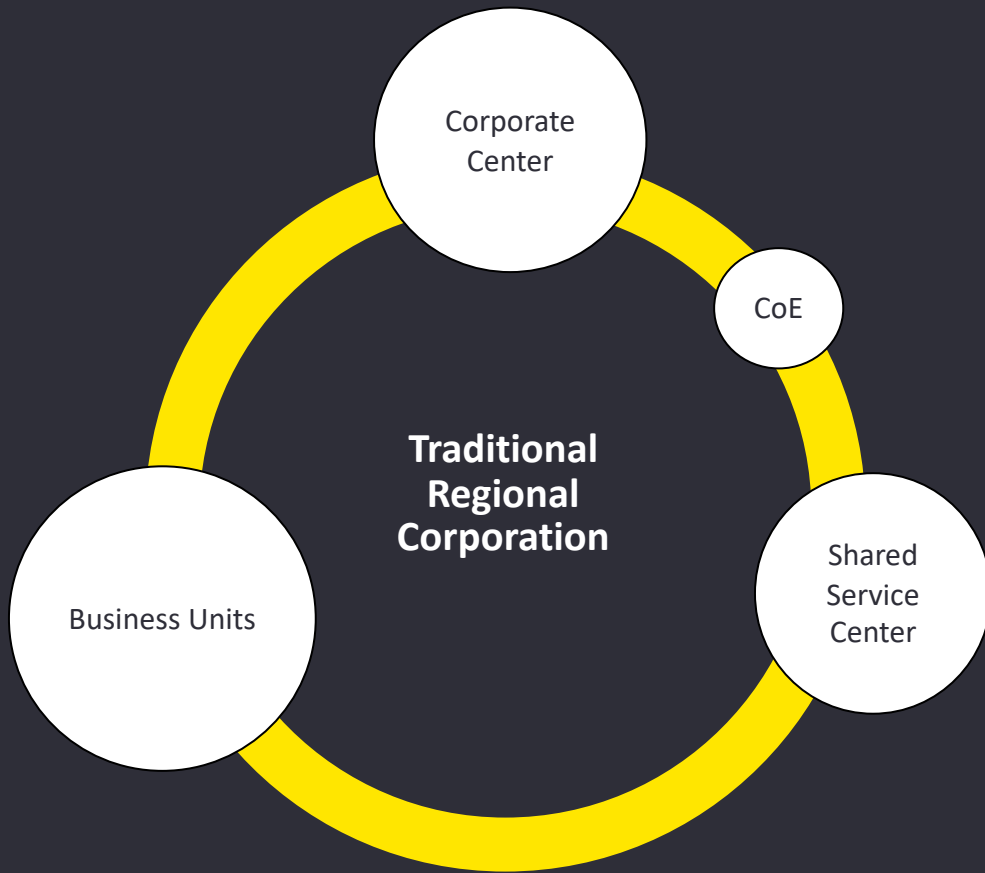
*Transactional and basic conceptual tasks are currently quite common within the GBS service portfolio*

*Advanced conceptual tasks, business partnering, and specially advanced insights and analytics are on top of the agenda of next years service offering*



### #3 – Future-oriented set up

GBS will continue as part of the governance model ... with a different architecture ...



- Minor-size corporate functions
- Business Units move processes to GBS
- Automated GBS more scope, less people
- Multiple CoEs
- Virtual and presencial workforce
- Less FTE and labor arbitrage



## La perspectiva del Dr. Carlos Mauricio Vásquez, Director General de Compensar

En la crisis derivada de la pandemia, cuál fue la mayor contribución del CSC de Compensar para su Organización?

En un mundo Post-Covid, qué espera de su CSC como contribución a los retos y desafíos de la Organización?



**CARLOS MAURICIO VÁSQUEZ**  
Director General de Compensar

▶ Video 2

# Top 6 action points

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- 1 | **A clear mandate and sponsorship** for GBS is essential, to operate as the transformation engine of the business through next-generation services and move up **E2E value chains and provide real cost efficiencies**
- 2 | Review **governance bodies** and strength with complementary perspectives
- 3 | Renew GBS objective **focus on value creation** and complement strategy setting **Digital / Innovation Centers of Excellence** (CoE) to evolve
- 4 | **Get the basics right**: robust operating model, key organizational capabilities, technology, data and controls
- 5 | Determine your **required skillsets for Next Generation GBS** including Digital view
- 6 | Start now – pace of change is moving faster and **GBS must be ahead for truly business enablement**



# GRACIAS

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