

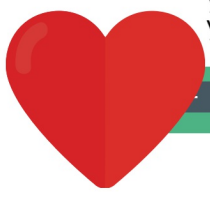


# Shared Services Brand Development Roadmap Higher Education Edition

A strong shared services brand can create energy and establish the value of shared services in the eyes of customers as well as leadership teams. In this infographic, we've broken down the steps you need to take in order to develop a compelling shared services brand that drives adoption, cultural change and stakeholder buy-in. All the while, keeping in mind the unique challenges that Higher Ed SSO leaders face such as limited budgets, extreme resistance to change and legacy IT infrastructure.

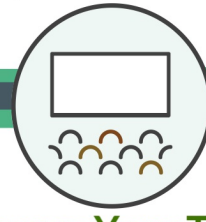
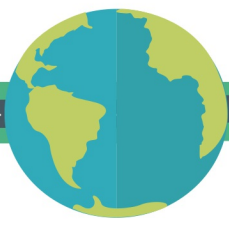
## Define Your Core Brand Values

Ask yourself three key questions to help determine your brand objectives. Why is it essential for you to create a brand for your SSO? What is it that you want your brand to do for your organization? And what do you want others to know and say about your SSO?



## Ensure Strategic Alignment

Make sure your brand aligns with your organizations core mission. As Whitney Pugh, Executive, Director of Budget and Planning, Utah State University explains, "Our brand is an organization of professionals dedicated to supporting the academic mission of the university. We really try to nurture an image of employing qualified, knowledgeable professionals, who are able to focus on the business operations of the university so that the faculty can focus on instruction and research. Our vision for our shared services -to support the mission of the university by providing excellent customer service, accountability, compliant transactions, and fiscal responsibility - really drives the brand."



## Define Scope

"I think the best thing someone can do to develop their voice is to clearly define the scope of the operation. Sounds simple. But, execution is tough. At first, the scope will seem too broad. It will seem like shared services is taking over everything. Over time, as your brand becomes better-recognized, and the customers begin to recognize the expertise, there will be attempts to expand the scope of shared services, whether you like it (or are prepared for it) or not."

-Whitney Pugh, Executive Director of Budget and Planning, Utah State University

## Identify and Assess Your Target Audience

Your value proposition must be relevant to your target market so it's critical you understand who your customer is, where they come from, what they value, how they communicate and what they need from shared services. As Deborah Zumbach, Director, UI Purchasing and Business Services, University of Iowa puts it, "understand first what your customers want. Don't assume."



## Develop A New Name, Logo and Tagline.

Though developing a specific name, logo and tagline for your SSO may seem unnecessary, doing so is an important step for establishing a unique identity for your SSO. The best taglines state a benefit or solution to a problem customers are facing, have an emotional impact and are concise. Further reading: The Psychology Of Color In Logo Design

## Road Block!



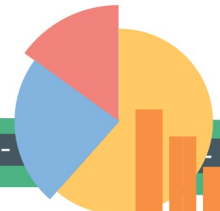
## Leadership Teams Don't See the ROI

"It is a difficult time for higher education, particularly in the Northeast. Demographic trends and an increasingly competitive environment mean that now, more than ever, colleges are being forced to streamline and be more cost efficient in order to remain viable"

-Amy Schwartz, Associate Vice Chancellor of Partnerships & SS Initiatives, University System of New Hampshire

## Brand Strength = Your Reputation X Your Visibility

Your brand identity should be repeatedly communicated, in multiple ways with frequency and consistency throughout your SSO's lifecycle. Leverage all channels available to promote your SSO brand such as email, social media, meetings, etc. Having a formal communications and content marketing strategy in place will not only help you control the conversation, but also help drive adoption and compliance.



## Leverage Relationships

"The best strategy for communicating ROI is creating a relationship with the campuses and solving their problems. I think about what resources I have that they might need, and how can I help deliver a solution promptly? Even assisting with issues that are not considered traditional 'shared services'—almost acting as a consultant across different departments can result in building a relationship and a sense of trust that can be built upon to further grow shared services initiatives."

-Amy Schwartz, Associate Vice Chancellor of Partnerships & SS Initiatives, University System of New Hampshire

## Embrace Data

"We use Banner for our enterprise computing system. We are able to mine that system for some valuable quantitative data - we can see who is doing the work. It is tough to draw a lot of qualitative conclusions from the Banner data so we have had to rely on anecdotal support. As time has gone by, some of our early-adopters have provided positive anecdotes of the impact of the new model. This has assuaged the concerns, in most cases, of some areas that were taking the wait-and-see approach. Honestly, a lot of our validation occurs in the trenches, face-to-face, when our employees serve our customers on a daily basis".

-Whitney Pugh, Executive Director of Budget and Planning, Utah State University



## Consider Creating New Job Titles for SSO Employees

"We created new titles for the employees in our organization, and have limited the use of those titles only to our department. No other departments or positions at the university use these titles. What this has done is created a recognition of our organization. People refer to our titles all of the time. The new titles are included in new policies. It's really created a new infrastructure under which business decisions and ideas are discussed."

-Whitney Pugh, Executive Director of Budget and Planning, Utah State University



## Create A Brand Management Culture

Develop detailed principles and guidelines for how your brand should be expressed. Provide training to ensure SSO employees understand how your brand is supposed to resonate with customers. At the University of Iowa, "we created a communication ambassador group to share our message. They knew the dialogue and bought into the brand. They were our voice" says Deborah Zumbach, Director, UI Purchasing and Business Services.

## Implement, Track and Adjust

Leverage marketing metrics, social analytics and customer surveys to measure and continuously improve the effectiveness of your new brand. Remember, as your SSO evolves, so should your brand.

## Contributors

Both Amy and Whitney will be presenting at the 10th Shared Services & Process Improvement for Higher Education & Government Summit



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### Deborah Zumbach

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### See Amy Present!

MAIN CONFERENCE DAY ONE  
2:15pm Thursday, November 30  
Develop a Compelling "Voice" for Your Shared Services Initiatives

### See Whitney Present!

PRE-CONFERENCE FOCUS DAY  
2:00pm Wednesday, November 29  
Building Blocks Towards a Self-Sustaining Funding Model

### See Deborah Present!

PRE-CONFERENCE FOCUS DAY  
10:45am Wednesday, November 29  
How UIO Achieved Up To 50% Turnaround Rate Decrease with Virtue Shared Services

