



Case Study – Shared Services Team Merger

Two Borough Councils requiring an integrated working solution

Summary

Two large Borough Councils recently set up an integrated shared service approach between them. Their goal was to realise cost savings through merging the shared service functions of their councils. Success necessitated the teams of the different services, IT, HR, Finance, Revenue and Benefits and their leaders to work in a closer, more collaborative way.

This was a major challenge as the merger was de-motivating to a number of employees as they saw their terms and conditions rationalised, their working practices changed, and in many cases a relocation requirement made a significant impact on their family lives, journey to work times and divisive issues like parking perks.

Emerge developed and facilitated a successful series of integrated team events for over 200 employees over the past year. Each service has had, or will have, a follow up session to equip the service leaders and their teams with shared goals, the knowledge, skills and collaborative approach to be able to realise performance improvements and cost savings

Background

In the current political and economic landscape all councils are challenged with getting more from less. They face difficult decisions about where to make cuts. These two councils have been proactive in looking for creative solutions to this ongoing challenge and merging their shared services was a model they have been early pioneers in adopting. It is fraught with obstacles and whilst it makes obvious cost savings the key challenge is to engage the employees involved to work with new processes and systems and keep them motivated.

These councils wished to give everyone of the c200 employees a voice in how they wanted to work together to deliver the challenging goals. To make this happen, Emerge designed a series of workshops for the different functions which were delivered in a condensed timescale. Each event had full leadership sponsorship and produced a series of strategic intentions and actions which were captured by Emerge and turned into a plan. The functions committed to keeping the actions at the heart of their day to day work to ensure that harmonised working practices, team charters and behaviours and enhanced leadership engagement continued long after the workshops were delivered.

Who Was Involved

There was sponsorship from the top levels of the councils, functional leaders, team leaders and all team members from the different functions were involved.



realising true potential



Emerge had a small team of facilitators running the workshops to ensure we became immersed in the cultural issues and the general climate and that we really understood the people, the challenges and the barriers to success.

The Emerge Approach

The goal of the Emerge Workshops called 'The Future in our Hands' was to

- Explore how to develop confidence levels
- Create and connect to the shared services vision and goals
- Manage personal reaction to change
- Self motivate and motivate others
- Put the customer at the heart of the service
- Work in a more collaborative and supportive way as merged functions
- Engage their respective teams to come up with solutions for the cost cutting
- Give difficult feedback on performance

The events were held off site and were run by senior Emerge facilitators who used a variety of thinking and problem methodologies on the different events to ensure maximum contribution from all. To keep momentum and ensure that all staff were involved in a timely way the 10+ workshops were scheduled close together. We used tools from the NLP tool kit; we ensured a warm and supportive climate and created activities to have fun and bond the team as well as to focus on hard edged outcomes. We produced in depth reports after each event for the functional leads which included action plans to be integrated and delivered through team briefing.

There was a mixed reception to the workshops from some long serving employees still bruised at the changes, but overall the enthusiasm and appreciation of being given a chance to be involved motivated the majority of employees.

Outcomes and Impact

These events acted as a catalyst to flush out where different people were on their personal change cycle. The feedback of how the change had been managed organisationally was not always positive. The knock on effect of this feedback was that the Board have undertaken some leadership development in order to manage future challenges utilising the feedback from their people.

Success for 'The Future in our Hands' was that across shared services the integrated team's climate would be improved, their ideas would be implemented, they would have had a voice and the leaders would have clear priorities. The programme led to some significant changes instigated by the employees which involved process improvement, removal of duplicated effort and even an office layout change.

There has been a follow up event for one of the functions a year after their first workshop and there has been an outstanding improvement in how the team views itself. We used a team diagnostic tool on the first workshop and repeated the activity and can see a 75% overall improvement on morale, clarity



of vision and goals, meetings effectiveness, understanding of working styles and management of conflict etc. One of the testimonials below relates to this team's follow up event.

Client Testimonial

Follow up Event Testimonial

I thought the day was fab! This is my first morning back since Wed so haven't picked up too much from colleagues but I thought the level of participation and willingness to engage was so much better than last time. I think you have given us a really good set of tools and a timely shot in the arm!

Thanks – we really enjoyed the day and seeing the progress the team has made.

Learning and Development Manager

Executive Team Day - Sponsor's Testimonial

I am sure you will get feedback from Rob on yesterday's session but I thought you would like to hear from us directly too. We thought the day went very well - lots of energy and fun but also a good deal of ground covered and work to take forward identified.

The pre-session exercises were very insightful and gave us a good starting point for discussions and built valuable understanding of where we need to focus.

Rob managed the day well and helped create a very good atmosphere of trust and openness so that when we did get to the more testing exercises people tackled them in a very positive frame of mind.

I think we all have a number of images of the day (mostly connected with the hula hoops) that will live with us for a long time.

Senior Exec – Partnerships and Performance