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Creating IT Shared Services

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Abstract:  
An important organizational trend is the practice of offering IT services via a shared services model. A shared services model is attractive to IT organizations, as it promises benefits due to centralization and/or consolidation of similar activities across the organization. For the business, a shared services model is attractive because it frees up resources by transferring responsibility for a noncore activity to another organizational body. Based on a focus group of senior IT managers from leading organizations, this article examines the current practice, in particular the reasons for adopting an IT services model, how IT shared services are structured, challenges during implementation, and benefits derived from this model once implemented. The article concludes with suggested strategies for organizations interested in creating an IT shared services organizational model.

Keywords: shared services, IT organization structure, IT business model

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I. CREATING IT SHARED SERVICES

A “shared service” is the “provision of a service by one part of an organization where that service had previously been found in more than one part of the organization. Thus the funding and resourcing of the service is shared and the providing department effectively becomes an internal service provider” [Wikipedia, 2010]. The key is the idea of “sharing” within an organization. It suggests centralization of resources, uniformity of service, consistent processes for service provisioning, economies of scale, reduced headcount, and enhanced professionalism. As such the concept of shared services has definite appeal for IT organizations, and creating shared services has been identified as one of the effective habits of successful CIOs [Andriole, 2007].

For the business as a whole, an IT shared service is also appealing but for a different set of reasons. While the promise of reducing costs, time, and complexity through reuse and the ability to leverage IT skills and knowledge are attractive, these benefits rank a distant second to the ability to free up resources by transferring responsibility for a noncore activity to another organizational body. Not surprisingly, the successful creation of a shared service is by necessity an exercise in goal alignment (between the business and IT) coupled with a strategy for goal attainment.

A shared services organization constitutes an alternate business model. Therefore, the decision to adopt a shared services model entails a number of critical questions for management, including:

- What are the key attributes of a good candidate for a shared service?
- How should a shared service be organized, managed, and governed?
- What is the relationship between a shared service and the parent organization?
- What can be learned from experience with a shared service model?
- What theoretical and practical insight is offered by published studies of shared services?

To explore these questions and the general phenomenon of IT shared services, the authors convened a focus group of senior IT managers from a variety of different companies representing several industries including manufacturing, insurance, consulting services, banking and finance, government services, pharmaceutical, retail, and telecommunications. In preparation for the meeting, focus group members were asked to respond to a series of questions, including: What is driving the current interest in shared services? What services have you converted to a shared services model? What were the factors behind these decisions? How are your shared services organized? What is the process of converting to a shared services model? What problems/issues did you encounter when converting? And, what specific benefits have you realized from switching to a shared services model in your organization?

The group was sequestered for an entire day and each member of the group shared their organization’s response to the above questions. The discussion was moderated by one of the authors, while the other author recorded the discussion. Of particular interest was the ensuing debate regarding the definition of a shared service. Some organizations offering shared services were challenged by others who did not consider some things to be actual shared services. As a result, we begin this article with a review of the published literature to provide some definitional clarity concerning the shared service model and to distinguish and differentiate between shared services and other closely related models. The remainder of the article summarizes the focus group discussion of the key management issues surrounding the IT shared service model, including their pros and cons, key organizational factors, and identification of candidate shared services. We conclude with an integrated shared service conceptual model and recommendations for moving toward shared services in IT.

II. IT SHARED SERVICES: OVERVIEW

As noted above, the key high-level concepts of a shared service are that a single group within the organization manages the service, the service is offered to any organizational unit in need of the service, and the shared service is a single-source provider. Accenture [2005] similarly defines a shared service as “the consolidation of support functions (such as human resources, finance, information technology, and procurement) from several departments into a standalone organizational entity whose only mission is to provide services as efficiently and effectively as possible.” While these definitions work in general, they also raise a number of questions. For instance, how does a
shared service differ from any other organizational unit that provides service to the organization (e.g., IT or HR)? How does a shared service organization relate to the parent organization? Does a shared service alter customer relationships in significant ways? How is a shared service governed?

Bergeron [2003] offers additional clarity by defining a shared service as a

... collaborative strategy in which a subset of existing business functions are concentrated into a new, semi-autonomous business unit that has a management structure designed to promote efficiency, value generation, cost savings, and improved service for the internal customers of the parent corporation, like a business competing in the open market.

This definition answers some of the above questions. For instance, it interprets shared services as a “collaborative strategy,” which differentiates it from an organizational structure/design exercise. For example, deciding that all customer support functions should report to the COO does not make customer support a shared service.

Bergeron further specifies that the shared service should be a “semi-autonomous” business unit with its own management structure which suggests a different and more “arms-length” relationship with the parent organization—one which allows sufficient management discretion to enable the shared service organization to attain its goals. These goals also differ within this definition with respect to their breadth and scope. Value generation, as a goal, takes the shared service organization well beyond efficiency and cost considerations; the goal of a shared service organization is to “improve the bottom line of the parent corporation, not to create a more efficient, internally streamlined shared business unit per se” [Bergeron, 2003, p. 5].

Bergeron’s definition also differentiates a shared service with respect to its customer orientation. In a shared services model, internal customers are treated as if they were external customers to be won or lost. With this orientation, the shared service competes aggressively for business, places customer satisfaction as a top priority, actively manages customer relationships, collaborates effectively on new business initiatives, markets its services internally, and communicates its performance to the business on the basis of quality, price, and time. This is not the lackadasical approach to customer service that is typical of organizations that treat their business partners as a captive audience.

Treating internal customers like external customers is a laudable goal, but, according to one focus group member, a shared service organization can theoretically go well beyond this approach. She explained that significant advantages accrue exclusively to an internal provider. For instance, a shared services organization has existing relationships with their internal customers with whom they enjoy unfettered access. Furthermore, they share goals, strategies, and culture. They have common knowledge and are motivated by the same reward systems. Their loyalty is to the same organization, and they share financial goals. External providers, in contrast, lack these advantages but have the benefit of other advantages. Most external providers have credibility beyond internal ones simply because they are competitive in the marketplace. They may also have economies of scale and advanced technology that can be amortized over a broad client base. Moreover, they may have superior skills and knowledge. Her argument was that an effective shared service organization, to the extent that it develops enhanced customer relationships and a competitive market orientation while both facilitating and benefiting from internal customer access, could at least theoretically realize the “best of both worlds.” More than just the convergence and streamlining of an organization’s functions to ensure that they deliver to the organization the services required of them as effectively and efficiently as possible, the true shared service organization generates value for the parent organization as if (and possibly) competing in the open market.

Shared services are related to, but should not be confused with, traditional models of delivering IT services [McKeen and Smith, 2007]. Carefully delineating each of these models further aids our understanding of shared services.

A shared service is most easily differentiated from a decentralized service delivery model. In the decentralized model, services are provided in various organizational units and managed locally. It is common in highly diversified organizations to find that each business unit has its own IT organization so that the provision of IT services can be tailored to the unique differences existing within each of the strategic business units.

In contrast, a centralized model for IT services brings all resources under a single management structure, adopting virtualization and standardization strategies to increase utilization of key resources and to lower operational costs. According to the American Productivity & Quality Center [1997], there are two primary differences between a centralized model and the shared services model. First, shared services have a customer-centric mindset (users of the service are viewed as customers and the shared services function is dedicated to providing high-quality, cost-effective, and timely service) and, second, shared services are run as an independent business with their own
budget and bottom-line accountability. The focus group concluded that a shared service would always be centralized, but a centralized service is not necessarily a shared service; that is, centralization is a “necessary but insufficient” condition for a shared service.

- The shared services model also differs from outsourcing where an external third party is paid to provide a service that was previously internal to the buying organization. While a shared services model is often viewed as a stepping-stone to outsourcing, the focus group suggested that the decision to create a shared service should not be a de facto decision to outsource. The relationship between outsourcing and shared services is further explored later.

- A shared services model also differs from a joint venture where two or more organizations create a separate, jointly owned, legal, and commercial entity which provides profit to its shareholders/owners. This delivery mechanism is used frequently in various industries such as banking and finance as well as oil and petroleum. As with the outsourcing model, the service is provided by an external agency that owns the profits derived from the provision of the service.

After a lengthy and animated discussion, the focus group reached a consensual understanding of a shared service organization. The members suggested that a true shared service must adhere to the following four principles:

1. Shared services involves more than just centralization or consolidation of similar activities in one location (although this was recognized as an essential part as noted above).
2. Shared services must embrace a customer orientation (i.e., as mentioned above, a shared service cannot behave as a monopolistic provider).
3. Sufficient management discretion and autonomy must exist within the shared services organization to allow freedom to generate the necessary efficiencies to create value for the parent organization.
4. Shared services must be run like a business in order to deliver services to internal customers with costs, quality, and timeliness that are competitive with that of external providers.

On this last point, one member of the focus group argued that a shared service provider would never satisfy internal customers unless and until the shared services organization is allowed to offer services to external customers. In his organization, despite spending a considerable amount of money on external consultants to prove that their IT shared service was competitive with that of external providers, the business “just didn’t buy it.” There seems to be a general unease among business executives about whether or not they are getting real value from their IT investments, and this carries over to shared services.

The other major concern for the focus group was the interpretation of “value” as created by the shared services organization. Some members felt that “value” was the demonstration that the shared services unit could provide cost savings to their parent organization. Other members felt that cost savings would be insufficient to justify the creation of a shared services organization arguing that simply centralizing services would produce similar savings. They felt that a shared services organization should be expected to generate additional value beyond efficiency—offering enhanced quality and/or differentiated services—such that value could be realized in terms of revenue generation. While no resolution emerged, it is clear that the broader interpretation of value aligns better with the group’s accepted definition of shared services.

III. IT SHARED SERVICES: PROS AND CONS

A shared service model for IT has the potential to deliver significant benefits to the organization [Bergeron, 2003]. From the parent organization’s perspective, shared services promises to:

- Reduce costs (due to consolidated operations) and improve service (due to the customer-centric focus)
- Reduce distractions from core competency activities (due to transferring noncore activities to the shared service organization)
- Potentially create an externally focused profit center (should the shared service decide to offer services beyond the parent organization)

From the perspective of the shared business unit, the shared service model promises to:

- Increase efficiencies (due to standardization and uniformity of services)
- Decrease personnel requirements (due to consolidated operations)
- Improve economies of scale (due to the concentration of purchasing, HR, and other specialized functions)
The focus group generally agreed with this list of possible benefits and suggested additional items, including:

- Professionalism (due to the adoption of a customer-centric approach to dealing with clients)
- Uniformity of service (due to consistent service provisioning across the enterprise)
- Personnel development (due to focused hiring, training and skills/knowledge development all targeted toward service management)
- Control (due to single-sourced service management)

However, there is also a case to be made against shared services [Bergeron, 2003]. The focus group highlighted the following limitations as being the most relevant for IT shared services:

- Becoming a disruption to the service flow
- Moving the work to a central location thereby creating wasteful handoffs, rework, and/or duplication
- Instilling an “us” versus “them” mentality within the provider-consumer relationship, and/or
- Lengthening the time it takes to deliver a service

The focus group also added the following:

- Additional costs associated with management bureaucracy and overhead
- Loss of control experienced by independent business units
- An increased communications burden, and/or
- Extraordinary one-time costs at start-up that are reflected within the service offerings

Thus, while the list of benefits of shared services is long and impressive, the downside risk is equally imposing. The focus group also warned that the above list of benefits represents “promised” benefits and that realizing actual benefits is a different matter!

To gain a different perspective of the tradeoffs between these pros and cons, members of the focus group were asked to share their actual experiences with IT shared services, highlighting failures as well as successes. Subsequent analysis revealed the following patterns of failure (from greatest to least impact):

- Promised headcount reduction does not materialize
- Customer-centric orientation gives way to indifferent service
- Excessive bureaucratization of the service
- Reduced headcount achieved but service levels deteriorate
- Cost efficiencies are realized through “one size fits all” service offerings

The following patterns of success were identified (from greatest to least impact):

- Service improves, producing quality, time, and cost advantages
- Service quality and time/cost savings are realized
- Service quality improves but without noticeable savings
- Headcounts are reduced, with service levels unchanged

The track record of the focus group was equivocal; no organization was celebrating the highest level of success, and none was publicly admitting to outright failure. Explaining the differences in outcomes was the next challenge.

**IV. IT SHARED SERVICES: KEY ORGANIZATIONAL SUCCESS FACTORS**

Interpreting the success of an organizational initiative depends on understanding the goals and objectives of those promoting the initiative. To gain some insight into this aspect of shared services, the focus group was asked what they felt was driving the current interest in shared services and whether it was being driven primarily from the business or from IT. This allowed us to examine not only the driving factors behind a shared services model but also highlight any differences between the business and IT perspectives. In the ensuing discussion, a significant gap...
emerged between the views of the business and the IT organizations with respect to a shared services model—specifically what problems it solved, the benefits it produced, and the unique challenges the adoption of a shared services model presents.

The majority of members felt that the push for shared services was coming from IT and that their IT organizations were sufficiently interested to actively promote a shared services model. In contrast, two members of the focus group declared that the push within their organizations was definitely coming from the business. One was a large organization whose goal was to become a “globally integrated enterprise” built on shared business services. IT was no exception. Specialized IT services, located globally anywhere that would yield advantage, were offered to all business units within the organization as a shared service. The other organization was undergoing an enterprise-wide initiative to outsource noncore activities and IT had come under the microscope. Here the focus group member stated that “our management clearly views shared services as a prerequisite for outsourcing.”

For organizations where the push for shared services originated within IT, the motivation was clearly cost savings and/or control. According to one member, “shared services are seen as one way to reduce IT cost and/or complexity and drive IT reuse. This is being driven today out of the IT organization, but we understand that our business partners need to be onboard for anything beyond the simplest of IT shared services.” Another focus group member stated that the interest was primarily being driven by her IT organization to achieve the following three key goals:

- Create reusable business functions to enable cost reduction.
- Drive agility by means of a set of well-defined horizontal services.
- Ultimately create a rationalized and simplified application portfolio.

When asked what problems a shared services model might solve, the focus group cited the following:

- Inconsistent integration patterns which lead to steadily increasing costs for solution maintenance and enhancement
- Building redundant applications using overly specific models because of the lack of a roadmap for sharing functionality
- Lack of integration which hampers reusability and economies of scale
- Increased and perhaps unnecessary IT complexity

The significant gap between how the IT organization approaches shared services as compared to the business is most apparent in the articulation of goals, objectives, and the ultimate justification of a shared services model. This gap becomes increasingly significant when coupled with the fact that the majority of shared services initiatives are being driven IT. In organizations where the driving force for shared services resides within the IT organization, the focus is commonly on that part of a shared service model that addresses IT problems, for example, reducing redundancy, encouraging integration and rationalizing the application portfolio. However, solving these problems addresses business problems only tangentially through reduced costs and streamlined processes and fails outright to attain the goals of customer centricity and enhanced service to the business. The differences between the business vision for shared services and the IT vision, unless aligned, is a recipe for disaster. Based on input from the focus group, we build a conceptual model that bridges this gap by integrating the technical aspects of an IT shared service with the business aspects. But, before we do this, it is necessary to first discuss the key factors that constitute the basis for decision-making regarding IT shared services.

V. IDENTIFYING CANDIDATE SERVICES

An analysis of the existing shared services within the focus group revealed very little in terms of discernible patterns. Some of the shared services were business-oriented services (e.g., payment processing or procurement) while others were IT-oriented (e.g., print management or network services). Some were comprehensive (e.g., application development, disaster recovery) while others were narrowly focused (e.g., credit authorization). Some of the services were deemed “core” while others were “noncore.” Other than enterprise-wide need, no obvious logical structure emerged from our analysis as a potential decision guideline for nominating shared services. In general, the focus group felt that the selection criteria of candidate services for the shared service model were best understood by contrasting shared services with outsourcing. They argued that any service being considered for outsourcing could also be a candidate for a shared service subject to three key differences: knowledge retention, control of resources, and value generation. That is, organizations appear to opt for a shared service in preference to outsourcing in order to retain critical knowledge and skills internally, to exercise greater control over these resources, or to capture additional value from the specific service rather than allowing it to accrue to the outsourcing
party. The conclusion reached by the focus group was that the processes structured as shared services appear to offer a significant level of either present or future intrinsic value to the parent organization which makes the organization reluctant to relinquish them to a third party. Services without incremental intrinsic value beyond cost savings are simply outsourced.

VI. AN INTEGRATED MODEL OF IT SHARED SERVICES

The focus group suggested that a shared service is best understood as layers (see Figure 1). In contrast to the Lacity and Fox [2008] framework, this conceptual model highlights the functional attributes of the business service, the management framework required to monitor and deliver the service, and the common technical infrastructure services that support it. It suggests that IT shared services is best viewed as interconnected layers of services; that is, business services are built on top of operational processes and common IT infrastructure, each of which deliver “services,” but of a different sort. For example, a common business function (e.g., e-forms) is leveraged by multiple business entities, supported by commonly managed business delivery processes and SLAs, and run on common, highly standardized IT infrastructure. This model highlights how a successful IT shared service depends on the effective coordination of each of these service layers. While service delivery processes, such as relationship management and SLA management, are critical for the business, infrastructure processes, such as server and network management, are equally critical for the IT organization. The model also suggests that focusing on a single layer while neglecting key processes existing within other layers is likely to be unsuccessful and lead to the eventual failure of the shared service. In organizations where the shared service is being driven by the IT organization with the goal of reuse, for example, the focus group suggested that the real danger is that attention will be predominantly focused on technical components while neglecting the managerial components (e.g., building effective customer relationships).

VII. RECOMMENDATIONS FOR CREATING EFFECTIVE IT SHARED SERVICES

Based on their experiences, focus group members agreed on four strategies that they believe would contribute to the successful creation of an IT shared service organization.
Create a Transparent Process for Goal Alignment

The group pointed out the importance of establishing a transparent process for articulating common goals. For IT managers, the key attraction of a shared service is typically cost savings and/or reduced complexity. Being able to reduce costs by means of mobilizing reusable assets, standardizing platforms, and virtualizing services, and eliminating redundant systems while providing a uniform and consistent level of service, is appealing. For business managers, however, the promise of cost savings comes second to the desire for enhanced customer service through improved quality, faster response and delivery, greater financial transparency and/or improved relationships with IT. Without goal clarity, transparency and alignment, the shared service organization will champion one set of goals over another, creating animosity between the parent organization and the shared service provider. One manager described the experience in her firm as follows:

*The centralization of the service was soon viewed by the business as a stand-in-line-and-wait for a one-size-fits-all solution … the fact that the business was unable to do an end-run on this delivery process was seen as unresponsive to the urgent and unforeseen demands placed on the business … the elimination of business priorities … no one on the business side wanted to hear about reduced costs of service.*

The focus group suggested that the creation of a shared service need not degrade into a situation of conflicting goals. There is nothing to suggest that improved service and cost reduction cannot be tackled simultaneously. In fact, the centralization process alone should produce sufficient economy of resources to enable enhanced quality of service. The difficulty is typically built in at the onset of the shared service by failing to articulate a set of explicit goals that have acceptance by both the business and IT. Without mutual acceptance and alignment, the shared service can be doomed at inception.

Develop a Comprehensive Investment Model

Establishing a shared service organization is not a trivial task. In the majority of cases, the existence of multiple distributed services across the enterprise (perhaps globally) presents formidable barriers to consolidation and coordination. Time differences, cultural differences and geographical distances all complicate the process. For global enterprises, legal differences also come into play in building an effective shared services organization. The focus group suggested that the larger the organization, the more onerous the task and the longer it takes. But shared services are not just large organization phenomena. As a practical rule, Bergeron [2003] suggests that the “shared services model is a viable option when the savings from reduction in staffing are greater than the added overhead of creating a management structure to run the shared business unit.”

Administrative overhead is a significant component of the overall investment in shared services. In addition, there are other substantial one-time costs associated with centralizing operations. These include relocating people, consolidating technology, establishing support roles/activities, developing capabilities/skills, and building communication networks to support centralized operations. Most organizations currently have chargeback mechanisms in place for IT services but, according to the members of the focus group, these mechanisms are often inadequate for a shared service. For well-defined services (like printing, desktops or e-forms), the costs are easily identified and associated with the service levels provided. With more complex services (e.g., payroll management, disaster recovery and planning, records management), however, costing of the actual service is less straightforward and requires more sophisticated algorithms to apportion costs for services provided. A key component is the ability to establish baselines for existing services. Without these, it is problematic to assess the incremental contribution of a shared service after its implementation.

A shared service investment model needs to account for significant ongoing costs in addition to the start-up costs mentioned above. Realistic implementation times range from “at least a year in simple domestic business scenarios involving one or two company locations to five years or more for a major international organization with dozens of locations” [Bergeron, 2003]. Furthermore, cultural change can present a more formidable challenge than amassing resources [Lacity and Fox, 2008]. A shared business unit is first and foremost about building relationships between the parent organization and the service unit. Building effective relationships takes time [Smith and McKeen, 2010].

The bottom line is that the investment model for the establishment of a shared service requires sophistication, understanding and a commitment from the business and from IT to make it work. Depending on the size of the undertaking, even reaching a breakeven point can be a protracted process. However, to the extent that the investment model is comprehensive and has the backing of senior management, it can withstand the ongoing challenges faced by any significant organizational transformation.

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1 Difficulty arises with apportioning actual costs on a service level basis. For instance, actual costs vary over time with usage, but business managers prefer to be billed on the basis of standardized rates/costs for specific services.
Redraft the Relationship with the Business

The establishment of a shared service necessitates a different type of relationship between the business and the service provider. For instance, with a distributed service, business management has the ability to impose priorities to reflect the demands of the business. These localized priorities, however, rarely survive the transition to a centralized service mechanism. As a result, the business typically experiences feelings of loss of control with the creation of a shared service. The old adage, “centralize for control, decentralize for service,” applies. Even worse is the potential to develop an “us versus them” mentality, where the business feels a tangible disconnect between the urgent demands of their business and the unresponsiveness of the shared service provider. The risk of this occurring is greatly enhanced in situations lacking goal alignment.

Therefore, a customer-service orientation must be instilled within the shared services organization to guarantee that satisfaction of the client remains the key goal. The need for an effective service orientation, particularly during the early stages of the development, is to counter the risk of the shared service being perceived as a “distant, unresponsive, and overly bureaucratic” provider. Furthermore, this orientation must be conveyed to the parent organization. This involves strengthening internal IT capabilities, changing the mindset of IT personnel, training and motivation, and commitment from all levels of management [Fonstad and Subramani, 2009]. To accomplish this, the shared service must build “internal sales and marketing” competencies which require resources focused on communicating with current and prospective customers [Bergeron, 2003].

Make People an Integral Part of the Process

Lacity and Fox [2008] argue that successful shared services result from effective management of four interrelated change programs: business process redesign (i.e., what business processes the shared services organization will perform), sourcing redesign (i.e., who performs the business processes), organizational redesign (i.e., where business processes will be performed), and technology enablement (i.e., technologies used to implement and coordinate the work). The focus group agreed with the need to manage each of these programs effectively but was particularly enamored with the notion that each of these programs was appropriately viewed as a “change” process. Their experience suggested that the difference between success and failure of IT shared service initiatives was frequently the result of the effectiveness of the change process itself.

The creation of a shared services organization requires significant transformation within the IT organization and directly impacts IT staff. As with outsourcing, dislocations are inevitable. As decentralized staff become centralized, reductions are expected, reporting relationships change, new skills are required, existing skills become redundant, and the overall relationship with the business becomes much more immediate and business-like with the focus on the bottom line. None of this happens automatically. Communication and marketing strategies take on new importance. Customer service is no longer a “take it or leave it” phenomenon. Training is essential. New metrics and key performance indicators become necessary. Service level agreements must be articulated and managed. Together, this represents enormous change for IT. Bergeron [2003] suggests, “The pace of cultural change, not the availability of resources or technology, generally gates the limitation.”

The focus group did not provide specific suggestions for organizations to follow, but stressed a realization of the enormity and significance of the organizational change that accompanies the adoption of a shared services model and a call to make the “people part” of the shared services implementation the top priority. In short, a customer service orientation is built over time and through the conscious and deliberate attention of all employees. It thus needs to be planned as thoroughly as any other major organizational transformation initiative.

VIII. CONCLUSION

The interest in adopting a shared services model for IT has grown substantially. This interest has been driven by the desire of business for a more customer-centric and responsive IT organization and by IT organizations pursuing centralization and standardization strategies. When successful, an IT shared services model can satisfy both goals, but key challenges arise during the development and implementation of the shared service. By bringing together a number of senior IT professionals with experience in building shared service organizations, this article has clarified what a shared service is and what it is not, identified different forms of success and failure, articulated an integrated conceptual model and provided a number of suggestions to improve the chances of successful implementation. For those charged with developing IT shared services as well as those investigating this emerging organizational form, this article provides insight and understanding for achieving successful shared services and ultimately the goal of improving overall organizational performance.
REFERENCES

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Heather A. Smith has been named North America’s most published researcher on IT and knowledge management issues. A senior research associate with Queen’s University School of Business at Kingston, Canada, she is the co-author of five books: IT Strategy: Issues and Practices, IT Strategy in Action, Management Challenges in IS: Successful Strategies and Appropriate Action, Making IT Happen: Critical Issues in IT Management, and Information Technology and Organizational Transformation: Solving the Management Puzzle. A former senior IT manager, she is currently co-director of the IT Management Forum and the CIO Brief, which facilitate inter-organizational learning among senior IT executives. She is also a senior research associate with the Society for Information Management’s Advanced Practices Council. In addition, she consults, presents, and collaborates with organizations worldwide, including British Petroleum, TD Bank, Canada Post, Ecole des Hautes Etudes Commerciales, the OPP, and Boston University. Her research is published in a variety of journals and books, including MIT Sloan Management Review, Communications of the Association for Information Systems, Knowledge Management Research and Practice, Journal of Information Systems and Technology, Journal of Information Technology Management, Information and Management, Database, CIO Canada, and the CIO Governments Review. She is also a member of the editorial board of MISQ-E.