



THE SYSTEM CFO SERIES  
HINDOL DATTA

FREE ASSESSMENT

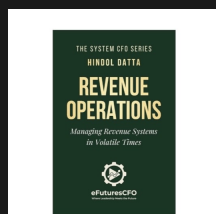
PILLAR 5: GOVERNANCE & GLOBAL STRUCTURE | TOOLKIT #50 OF 37

# THE GLOBAL SHARED SERVICES AND OUTSOURCING GOVERNANCE

*Managing the Risks and Rewards of  
Distributed Finance Operations*

20-Question Diagnostic | 5-Page Assessment

Score Your Organization 1-5 Across Four Dimensions  
Identify Gaps and Build Your Action Plan



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## QUESTIONS 1-5

## Section A: Shared Services Strategy and Scope Definition

*Have You Defined What Should Be Centralized, What Should Be Outsourced, and What Must Stay Local?*

*The decision to centralize or outsource finance operations is one of the most consequential structural decisions a CFO makes. Done well, shared services deliver cost savings, process standardization, and scalability. Done poorly, they create communication barriers, quality problems, and loss of business context. The System CFO builds a shared services strategy that is specific about which functions to centralize, which to outsource, and which must remain in-market.*

### A. SHARED SERVICES STRATEGY AND SCOPE DEFINITION

1	A documented shared services strategy exists — specifying which finance functions are performed centrally, which are outsourced to third parties, and which remain embedded in	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
2	The scope of shared services is defined by process maturity — only processes that are standardized, documented, and measurable have been moved to shared services, with complex	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
3	The business case for shared services is validated — cost savings, quality improvement, and scalability benefits are quantified and tracked against the investment in establishing	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
4	Make-vs-buy analysis has been conducted for outsourcing — the decision to outsource (BPO) versus build internal shared services is based on comparative analysis of cost, quality,	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
5	Transition planning is thorough — processes moved to shared services or outsourcing partners have detailed transition plans including knowledge transfer, parallel processing,	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

**SECTION A SCORE:** Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5



**QUESTIONS 6-10**

## Section B: Service Level Management and Quality Control

*Are You Getting What You Are Paying For — and How Would You Know?*

*Service levels define the contract between shared services and the business — what will be delivered, how fast, how accurately, and at what cost. Without defined SLAs, shared services devolves into a vague arrangement where the business is dissatisfied and shared services cannot demonstrate its value. The System CFO builds an SLA framework that creates accountability, enables measurement, and drives continuous improvement.*

**B. SERVICE LEVEL MANAGEMENT AND QUALITY CONTROL**

<p><b>6</b> Service Level Agreements are defined for every shared services function — covering turnaround time, accuracy, volume capacity, escalation procedures, and reporting requirements</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>7</b> SLA performance is measured and reported monthly — actual performance is compared against SLA targets, with root cause analysis for misses and corrective action plans for persistent</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>8</b> Quality metrics complement efficiency metrics — error rates, rework percentages, and customer satisfaction scores are tracked alongside volume and speed metrics to ensure quality</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>9</b> A governance meeting cadence exists between shared services and business stakeholders — regular reviews discuss performance, address issues, plan capacity changes, and align</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>10</b> Escalation procedures are defined and effective — when shared services cannot meet SLAs or encounters issues beyond its authority, there is a clear escalation path with defined</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>

**SECTION B SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**

**QUESTIONS 11-15**

## Section C: Knowledge Management and Talent Development

*Is Critical Knowledge Documented — or Trapped in the Heads of Your Offshore Team?*

*The greatest risk in shared services and outsourcing is knowledge concentration. When process knowledge exists only in the heads of team members in a distant location, the organization is one resignation away from operational disruption. The System CFO builds knowledge management systems that capture, document, and distribute critical process knowledge, ensuring that no single person or location is a point of failure.*

**C. KNOWLEDGE MANAGEMENT AND TALENT DEVELOPMENT**

<p><b>11</b> Desktop procedures exist for all shared services functions — step-by-step documentation enables any qualified person to execute any process, reducing dependency on specific</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>12</b> Knowledge transfer is structured and verified — when processes are transitioned to shared services, knowledge transfer follows a defined methodology with competency verification</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>13</b> Cross-training prevents single-person dependencies — at least two people in the shared services function can perform every critical task, and backup capability is tested through planned</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>14</b> Career development paths exist for shared services team members — progression opportunities, skill development, and performance recognition retain high-performing team members</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>15</b> Turnover in shared services is tracked and managed — attrition rates are monitored against benchmarks, exit interview data is analyzed, and retention strategies are implemented for high-</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>

**SECTION C SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**



**QUESTIONS 16-20**

## Section D: Technology, Security, and Continuous Improvement

*Is Your Shared Services Operation Evolving — or Just Maintaining the Status Quo?*

*Shared services organizations that do not continuously improve eventually deliver less value than the operations they replaced. Technology, automation, and process innovation should drive continuous efficiency gains that flow through as cost savings or reinvestment in quality. The System CFO ensures that shared services is a platform for improvement, not a fixed-cost operation that resists change.*

**D. TECHNOLOGY, SECURITY, AND CONTINUOUS IMPROVEMENT**

16	Shared services uses automation to improve efficiency — RPA, workflow automation, and AI-assisted processing are deployed for high-volume, rule-based tasks, freeing team members for	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	Data security and access controls are appropriate — shared services team members have role-based access to financial systems with controls reflecting the sensitivity of the data	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	Continuous improvement is embedded in operations — shared services teams identify and implement process improvements regularly, with a formal mechanism for capturing ideas.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	Technology infrastructure supports distributed operations — collaboration tools, secure remote access, reliable connectivity, and appropriate hardware and software enable	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	The shared services model is periodically reassessed — the scope, location, structure, and economic model of shared services are reviewed at least annually to ensure alignment	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

**SECTION D SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**

**OVERALL ASSESSMENT SCORE**  
 Section A: \_\_\_\_ / 25    Section B: \_\_\_\_ / 25    Section C: \_\_\_\_ / 25    Section D: \_\_\_\_ / 25    TOTAL: \_\_\_\_ / 100    AVG: \_\_\_\_ / 5

**GAP TO GOAL**

# Gap-to-Goal Action Plan

*Bridging the Gap — Global Shared Services and Outsourcing Governance Diagnostic*

Transfer your five lowest-scoring questions. For each gap, define the target state, specific actions, owner, timeline, and success metric. Focus on highest-impact gaps first.

GAP #	Q REF	CURRENT	TARGET	SPECIFIC ACTION TO CLOSE GAP	OWNER	DEADLINE	METRIC
1	Q__	___/5	___/5	_____	_____	_____	_____
2	Q__	___/5	___/5	_____	_____	_____	_____
3	Q__	___/5	___/5	_____	_____	_____	_____
4	Q__	___/5	___/5	_____	_____	_____	_____
5	Q__	___/5	___/5	_____	_____	_____	_____

### ASSESSMENT SUMMARY

Completed by: \_\_\_\_\_ Date: \_\_\_\_\_

Overall average score: \_\_\_ / 5    Items scored 1-2 (critical): \_\_\_

Items scored 3 (developing): \_\_\_    Items scored 4-5 (strong): \_\_\_

Top strength: \_\_\_\_\_

Most critical gap: \_\_\_\_\_

One action this week: \_\_\_\_\_

### READY TO GO DEEPER?

This free assessment identified your gaps. The Premium System CFO Toolkits provide the frameworks, templates, and action plans to close them. Visit [EfuturesCFO.com](http://EfuturesCFO.com)





READY TO GO DEEPER?

## This Assessment Identified the Gaps. The Premium Toolkit Closes Them.

**PREMIUM: The Organizational Finance Assessment Kit (46 Pages)**

The full premium assessment kit includes comprehensive diagnostics across 16 finance domains including shared services governance, operational excellence, and global finance structure, with 300+ evaluation items and detailed remediation planning templates.

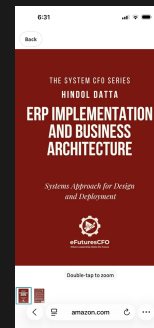
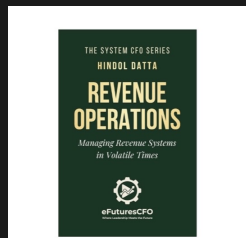
*Plus: Access the Super Exclusive 46-Page  
System CFO Organizational Finance Assessment Kit*

### ABOUT THE AUTHOR

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