

What to Consider When Exploring a Centralized Administrative Services Model

Backbone Live | September 9, 2022

Roundtable Moderator & Panelists

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Ready, set, go! If your organization is moving forward, here are signposts for success!

INTRO

A message from the Backbone Live Roundtable Moderator, Joanne Linden.

When I was approached to moderate this panel by the Admin Awards, I did not hesitate to accept the challenge.

The Centralized Administrative Services Model has been a topic of conversation throughout the admin community for quite some time and I was interested in learning more about it myself.

I'll admit I'm skeptical about this model and how it will affect the administrative profession. I've been around long enough to see us go from being secretaries, to administrative assistants, to administrative professionals, to executive assistants, to administrative business partners and beyond.

My first thought was, does this set us back 30 years in our attempt to becoming strategic business partners with our leaders? Not to mention all the gains we've made over the past 3 decades in terms of career pathing, professional development, and competitive compensation.

Setting skepticism aside and with an open mind and insatiable curiosity our panel dove headfirst into the key elements we felt were most important to understand related to this model in hopes of better educating our industry, the roundtable audience and in the process, ourselves.

We hope the roundtable discussion's event recording and this whitepaper serve as useful tools as you explore what's best for you, your organization and your leaders in how to structure the most effective and impactful administrative function. Our panelists are standing by should you have any additional questions.

What is a Centralized Administrative Model?

A new way to work.

A **Shared Services Organization** (or SSO) is an organizational structure that has become widely embraced and adopted by private and public enterprises. The model shifts common activities from individual business units to a centralized, multi-disciplined operation to reduce costs and eliminate redundancies while also simplifying and streamlining routine tasks to improve service quality. The incentive is to improve overall efficiency and enhance productivity by expanding access to a broader array of talent, competencies, and resources by fundamentally redesigning how work gets done and by whom.

When applied specifically to Executive and Administrative Assistants, an SSO is often referred to as a **Centralized Administrative Services Model**. Under this structure, administrative and clerical roles and tasks are consolidated to be handled by a team of Admins in an effort to reduce costs and improve service quality. The team delivers a wide array of generalized and specialized support to executives, initiatives, or projects.

02

What are common organization shared services models?

Structures are varied and many.

In terms of organizational structure for a shared work model, there really isn't a "one size fits all" solution. In general, centralized administrative models are built around teams or small clusters of EAs who report to a dedicated manager. It is also common for the individuals who make up a team also have a reporting responsibility to a single executive leader or a group of executive leaders.

Here is how a select group of "best in class" companies have structured their shared administrative organizations:

Fidelity Investments: An Opportunity to Expand Your Horizons

The shared services model within one of the business units at Fidelity Investments is built around a group of 33 Senior Executive Assistants divided into three teams each with a manager and a director overseeing the group. The 33 EAs provide a wide array of support for over 2000 associates from dedicated daily support and ad hoc requests.

Erin Joslyn, Fidelity Investments, explains, "Our team managers also have responsibility for a series of initiatives and their EAs have the opportunity and option to support these special projects. However, the person an EA supports is always their number one priority and anything beyond that is secondary under our structure."

ExxonMobil Upstream Research Company: Subject Matter Expertise

The Central Support Model at ExxonMobil Upstream Research is structured around 3 teams of about 15 admins and one supervisor. The three teams serve approximately 2000-5000 people and supports a single business function across a broad array of tasks. Within the team, there are executive assistants, administrative assistants and technicians that provide direct, generalized administrative support such as calendar management or others have roles that are more specialized to handle technical demands, records management or procurement related requests.

McKinsey & Company: The 3 C's

Collaboration, communication and consistency among the team members is key to the success of the team model at McKinsey & Company - Boston. Structured around a 25-person team with a leader, the McKinsey shared services team supports the practice broadly while also being assigned in "clusters" of 3-4 admins to support 1-2 partners.

It's important to note that when an organization adopts a centralized model, an individual EA may be offered the choice of working within the model or opting out. Centralized models can also be adapted to function within an in-office or hybrid work environment.

03

Why establish a centralized administrative services model?

Keep the end in mind.

A dynamic centralized administrative model cannot thrive without the commitment and buy-in of leadership, management, and admins supporting the model.

If you are asked to participate in a working group to determine if a centralized model will fit the needs of your organization, Jennifer Boyd, ExxonMobil Upstream Research, offers insight: "The people who do the work understand how to make a process better. Empowering the administrative staff to streamline the processes they work with everyday can be powerful and provide untapped value to the business." Boyd believes that at her company, "Without a centralized model, official change would have been impossible." She continues, "Before we adopted the model, the admins would agree to a process and then go back to their desk and do whatever they wanted, even if it was inefficient."

Key predictor of success:

Regardless of the framework, the one key predictor of a successful structure is the empowerment of the EAs to drive and improve the organizational model to suit the needs of the business.

Determine

"Is a Centralized Administrative Services Model a viable staffing option for our organization or for the type of work being performed?"

Answer

The answer requires a rigorous and thorough analysis of administrative processes and expectations. Best in class studies include EAs in the "discovery" stage as they are closest to the work and intuitively understand how to improve a process.

Analyze

The objective is to examine and determine:

- Processes to be streamlined and simplified
- Opportunities for organizational productivity and efficiencies
- Identification of talent and classify competencies - tthis applies not only to the administrative assistant team but also to the leaders of the admin team or teams. The leader needs to have the background and experience to understand the role and the potential challenges and developmental opportunities
- Evaluation of any potential cost savings
- Establishment of KPIs
- Opportunities for collaboration and establish open communication channels or feedback loops

What are the critical success factors?

A few universal truths.

The model has to fulfill the promise to be a “team of teams” with guardrails bounded by Trust, Common Purpose, Shared Understandings and Empowered Execution (elements of the McChrystal Groups methodology for building effective teams).



Follow the leader.

The right team leadership is key. Begin by choosing a person who is transparent and empathetic. It's imperative that the leader creates a sentiment of trust, embraces a high level of advocacy, and fosters an environment of collaboration within the team. A team will rally around and follow a leader who can successfully define a mission and communicate a vision. Or as Boyd reminds, “Culture eats strategy for breakfast.” Within this “inclusive space,” team members will be able to be fearlessly candid about problems and willing to work in partnerships to develop solutions.

It's also critical that the team leader has strong management skills and understands the strengths of each of their team members to ensure that each is being assigned meaningful work and is being challenged to develop new competencies.



Practice, best practices.

By sharing information and experiences, exchanging perspectives and best practices, the McKinsey team learns from each other and relies on a robust catalog of “Best Practices.” Additionally, the admin team leaders are constantly providing status updates and feedback to ensure the team stays on track. The overarching focus is on uniformity with standardized and systemized approaches to ways of working, cross-training, and consistency. The resulting work environment is one of mutual support and advocacy. To Tammy Pimentel at McKinsey & Co, “One of the most valuable outcomes of our Best Practices document is that we all are so familiar with the work we each do, that it makes taking a day off or vacation really seamless and stress-free!”

We understand the assignment.

There are advantages! A shared or centralized model provides the admin team the opportunity to collaborate and learn from each other, while also sharing depth of experience and different perspectives. It also establishes a formalized framework that addresses different work styles by creating consistency and encouraging collaboration. As Joslyn observes, "A broad network of executive assistants is powerful! Each admin offers something different as far as how they work and what they know!"

"I have been an EA for over 30 years and I learn something new every day from peers. It's a great opportunity to also share your experience and expertise." - Tammy Pimentel

At its very heart, the idea behind a centralized administrative model is the idea of balancing the workload equitably and efficiently. From streamlining work-flow processes to a seamless and transparent exchange of information, the structure adds a more holistic approach to any project or initiative. It also improves the quality of office operations and enhances productivity.

Success breeds success.

Initially, the adoption of a centralized administrative model may place its greatest value on a set of tangible metrics - reduced census, labor costs, improved cash flow, KPI's, and consistent processes. The intangible gain is that the organization at large benefits by enhancing and expanding the knowledge base by identifying the right person with the right skillset for the right project. An admin can master a greater breadth of tasks while also garnering exposure to new disciplines. For example, an admin with a particular passion

or acumen for a particular task - perhaps event planning, digital content creation or communication - now has the opportunity to immerse themselves in that discipline. The result? Enhanced productivity, higher employee engagement and improved productivity.

What's in it for me?

For the individual administrative assistant, the greatest benefit is expanded opportunities for career development and advancement. With universally understood benchmarks and performance rankings, periodic performance assessments and annual reviews become more consistent.

With more balanced and shared work, scheduling also becomes less reactive and more predictive. As Pimentel says, "Coverage is amazing. In the past, you took a vacation when your executive did and not necessarily when you needed one! Now, when I am out of the office for whatever reason, I know the desk is handled and work is getting done!"

"A broad network of EAs is unbelievably powerful. If anybody in an organization needs to know something, they go to an EA for an answer. There is a built-in strength in a network!"

- Erin Joslyn

An alternative view: the risks and disadvantages.

Is this an example of one career step forward, two steps back?

There is concern that the centralized administrative support model diminishes the prestige of the position which in turn could result in difficulty recruiting, retaining and rewarding key administrative talent.

“Everyone in the pool?”

A centralized model can also have an adverse effect on succession planning for high ranking or senior executive assistant positions supporting the C-Suite at an elite level. A centralized administrative model is focused on supporting multiple internal functions or projects, not on “training up or grooming” assistants to support the specialized demands of high-profile executives. Observes Joanne Linden, Admin Universe, “I fear it could set the profession back to 1950’s and ‘secretarial pool’ mindset and jeopardize the contemporary perception of an EA as a ‘strategic partner.’ ”

You lose the pulse.

Without a clear one-to-one reporting structure, it is difficult for an EA to develop a dedicated and productive relationship with their primary executive and a deep connection to **what they do and why they do it.**



“An assistant develops a connection to their manager. I really appreciate guidance and advocacy, and knowing my manager has my best interests at heart. Under a shared model, you do lose that advocacy and the one-to-one relationship.”

- Katie Watts, Fivetran

No longer scaling the pinnacle of the profession?

The most valued EA is regarded as a Strategic Business Partner to their leader. These elite administrative professionals have demonstrated the ability to develop a special relationship with their executive to complement a deep understanding of their executives' leadership role within an organization. They support the advancement of their leader's objectives through a mastery of day-to-day tactical requirements combined with a holistic and intellectual understanding of the underlying strategy.

A centralized structure presents a risk to the notion of an EA as a strategic business partner because it disrupts the building of an exclusive and mutually beneficial relationship between an executive and their administrative assistant.

To Joan Burge, Office Dynamics International, a respected thought leader and mentor to the administrative assistant profession, "Centralization is being 'about the whole' and leaders are unique - with unique goals, missions, and projects. Assistants need to be focused on developing their strategic partnerships with their leaders and focused on strategic thinking, not just tactical work. The partnership between an executive leader and his administrative assistant is a unique a special relationship. I just don't believe that supporting an executive and then working on other projects creates an environment for that relationship to blossom."

"Centralization takes away the prestige for the executive assistant position that we have been trying to build for 50 years."

- Joan Burge, Office Dynamics

What gets measured, gets done!

Within most shared administrative structures, performance assessments are the responsibility of the team leader. Removing the organizational leaders from the performance assessment process can have the adverse effect of limiting personal initiative and individual contributions, while also affecting opportunities for greater compensation and added responsibility.

**THE PERSON WHO KNOWS HOW
WILL ALWAYS HAVE A JOB.**

**THE PERSON WHO KNOWS WHY
WILL ALWAYS BE IN CHARGE.**

- RALPH WALDO EMERSON

Ready, set, go!

If your leadership team is contemplating a centralized model or has completed the due diligence and is putting it in place, then there are a few ways you can accept, advise, and advance the transformation.

Change is challenging.

It's understood that no one likes change. Be prepared that the transition and transformation may be messy and a bit bumpy. Speaking from experience, Boyd says, "It's a little chaotic in the beginning! Reporting lines can be confusing and information can be conflicting. Just accept that it's not going to be perfectly figured out in the beginning. I recommend that you just sit in the chaos and get comfortable - all while gaining clarity. I promise, it will smooth out over time!"



Stay positive.

The model offers many benefits in terms of learning new skills, rewarding mastery of competencies, and opportunities to gain exposure to different aspects of the business and your role. Joslyn reflects, "I don't think there are any key disadvantages to a shared services model. Initially, you and your EA colleagues may find the change difficult or scary. That's human nature. However, with the right guidance and open communication, I have found that those early skeptics have found that there are more advantages than disadvantages!"



In many, one.

A centralized model gives an EA access to new perspectives and expanded resources. More importantly, it also means working closely with colleagues with whom you can share experience and expertise.



"I do think there is a fear of losing your voice. I learned that when many voices join together in work, you are really louder!"

- Katie Watts, Fivetran

Signposts for success:

- ❑ Communicate a clear understanding of “WHY”
- ❑ Identify and align leadership and stakeholders
- ❑ Be intentional. Take the time to build the model and roll it out thoughtfully and with purpose or “Accuracy over speed!” Don’t rush the initiative
- ❑ Focus on the service quality
- ❑ Commit to “End-to-End Thinking” when designing work processes
- ❑ Implement a tool that enables easy tracking of work assignments and progress
- ❑ Azure DevOps is a Microsoft tool that ExxonMobil re-purposed to monitor work in-take, track objectives and report results. It also features a project status update system - pending, closed and delayed”
- ❑ Identify talent and assess individual competencies
- ❑ Create an EA competency chart that lists SMEs and strengths
- ❑ Factor developmental opportunities
- ❑ Design change management programs to prepare for transitions and prepare to embrace the chaos during the transition
- ❑ Create an Internal Communications plan up front
- ❑ Develop work-flow processes for shared services and specialized services
- ❑ Plan and execute training and onboarding with an emphasis on team building
- ❑ Pursue continuous refinement and evolution
- ❑ Create and continuously update a Best Practices Document

Once the centralized model is up and running, be relentless in your pursuit of process refinement and aim for consistency to elevate execution and embrace your team’s shared purpose.

A dynamic shared services model for administrative assistants should always be evolving and responding to the needs of the business, while also giving the admin an opportunity to grow professionally.

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