



PB INSTITUTE OF RESEARCH AND TECHNOLOGY

P.O Box 21457-00100

Nairobi - Kenya

Mobile: +254 721 214 795

Email: info@pebblesinstitute.org

Lean Finance: Shared Services & Centralized Budget Optimization

Duration: 5 days

On-Site

01 Who Should Attend

- Shared Services Managers
- Business Process Managers
- Corporate Planning Professionals
- Department Heads
- Operations Managers
- Procurement and Supply Chain Professionals
- ERP and Finance Transformation Professionals
- Internal Auditors
- Risk and Compliance Professionals
- Public Sector Finance Professionals
- Professionals involved in financial transformation and organizational restructuring



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02 About the Course

Integrated Finance: Shared Services and Centralized Budgeting is a practical training course designed to equip finance, budgeting, and management professionals with the knowledge and skills required to implement effective shared-services and centralized budgeting models. The course explores how organizations can consolidate financial functions, standardize budgeting processes, improve financial controls, reduce duplication, and achieve greater efficiency through centralized financial management. Participants will examine the benefits and challenges of shared financial services, centralized budget preparation, governance structures, service-level arrangements, cost allocation, technology integration, and performance management. The course emphasizes practical approaches for balancing centralized control with the operational needs and accountability of individual departments and business units.

03 Workshop Objectives

- Understand the principles and benefits of shared services.
- Master the methodology for designing a shared services center.
- Develop a centralized budgeting framework for financial control.
- Create a robust chargeback and service level agreement (SLA) system.
- Manage the change management process for a successful transition.
- Optimize resource allocation and improve process efficiency.
- Use a centralized budget to enforce strategic priorities.
- Measure the financial and operational performance of shared services.
- Foster a collaborative and customer-focused service culture.

04 Module Topics

Module 1: The Case for Shared Services



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- The principles of shared services vs. traditional business models.
- Key drivers for implementing a shared services model.
- The benefits: cost reduction, process standardization, and service improvement.
- Common risks and challenges to implementation.
- Case studies of successful shared services centers.

Module 2: Designing the Shared Services Model

- Choosing the right scope for shared services.
- The process of centralizing key functions.
- Defining the organizational structure of the shared services center.
- Technology and platform requirements.
- Key considerations for a phased implementation.

Module 3: Centralized Budgeting Framework

- The principles of centralized budgeting.
- How centralized budgeting drives strategic alignment.
- The role of the central finance team in budget creation.
- A step-by-step guide to developing a centralized budget.
- How to balance top-down control with departmental input.

Module 4: Service Level Agreements (SLAs) and Chargebacks

- The purpose and components of a Service Level Agreement (SLA).
- Developing clear and measurable SLAs with internal customers.
- Designing a transparent and fair chargeback model.
- Using chargebacks to influence behavior and manage demand.
- Best practices for managing performance against SLAs.

Module 5: Operational Efficiency and Process Improvement



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- Identifying and eliminating waste within shared services.
- Using lean and Six Sigma principles for process optimization.
- The role of automation and robotics in shared services.
- Continuous improvement in a service delivery context.
- Measuring operational efficiency and cost savings.

Module 6: Change Management and Communication

- Building a compelling business case for shared services.
- The role of leadership in championing the change.
- A communication plan for internal and external stakeholders.
- Managing employee morale and addressing resistance.
- Training and skill development for a successful transition.

Module 7: Performance Measurement and Reporting

- Key performance indicators (KPIs) for shared services.
- Creating a performance dashboard for senior management.
- Reporting on financial savings and service quality.
- Using feedback to continuously improve services.
- The role of governance in a shared services model.

Module 8: Final Workshop and Action Plan

- A comprehensive case study on implementing shared services.
- Participants work in groups to develop a plan for their organization.
- Presenting your plan for a shared services model.
- A final Q&A and best practice sharing session.
- Developing a personal action plan for your organization.