



The evolution of PwC Business Support

1. The centralisation approach and the transition process

Our journey as Business Support department

Business Support: a wonderful field that is always evolving and where management and executive assistants are invaluable. They are the ultimate connectors, fostering collaborations and playing a crucial role in the smooth functioning of an organisation. In a time when collaboration is more important than ever, they are the super connectors that ensure an organisation works. PwC provides business services in the areas of Assurance, Tax & Legal and Advisory. The goal is for these services to contribute to building trust in society and solving important problems.

Within PwC, the Business Support department is responsible for secretarial and organisational work and for coordinating tasks for senior managers, partners, and directors (hereinafter referred to as: stakeholders). The aim is to actively support and manage the stakeholders, with our assistants taking a proactive approach and taking on as much work as possible. PwC believes it is important to enable assistants to reach their full potential. We are convinced that this is a field that will not disappear but will keep evolving. That is why we decided to make a drastic change in 2011: from a decentralised standalone secretarial support to a centralised Business Support that is continuously evolving and responding to changes within and outside PwC.

This beautiful but challenging journey we made as the Business Support department led to impactful results: a proactive and customer-oriented support that is independent of location and time and anticipates PwC's

priorities. Think of a period like COVID-19, when we were able to quickly retrain our assistants to become virtual assistants because we already had an experienced group of virtual assistants. In addition, we offer appropriate and varied service packages for our stakeholders and assistants. This provides benefits in terms of learning and development through our continuous talent and service development. Another important effect: with our current Business Support, we contribute to happy and engaged employees.

This whitepaper consists of three parts, and tells our complete story of the history, the centralisation approach and the transition process of Business Support, the insights gained, and our new vision for the future. In this first whitepaper, we will take you through our history: what did Business Support look like before centralisation and what were the reasons for choosing centralisation and expanding our new services? We believe in a combination of an outside-in and inside-out approach, actively seeking trends and developments in the market on the one hand, and receiving and sharing knowledge with other organisations on the other hand. During our journey, we learned a lot from others, such as the design of our virtual concept and digitisation in terms of tooling. Therefore, we share with you the knowledge and experience of our approach to the new Business Support and the transition process.



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Figure 1: The Business Support journey through the years.



1. The history of Business Support

1.1 From traditional secretary to modern assistant

The human skills of assistants in the past, present, and future

The assistant profession is a wonderful field that always continues to evolve, as we mentioned earlier. This is largely due to the rise of technology, which has significantly changed the traditional assistant's tasks. Before we delve into what our Business Support looked like in the past, let us take you through the history of assistants. What were and are their unique human skills?

Figure 2: From secretary from the past to the assistant of today



Past

In the past, assistants were often seen as support staff and performed tasks such as drafting letters, collecting signatures for documentation, and managing postal books. The role of the traditional secretary at that time was strongly focused on servitude; they carried out the requests of others without much room for their own input.

Present

Today, we use technology to make our work easier. The tasks of assistants have not disappeared, but the way they are performed has changed: they are easier and faster. This shift has saved time for assistants, allowing them to focus more on, for example, managing substantive projects. This requires a proactive mindset and the ability to anticipate. Today's assistants possess unique human skills that cannot be replaced by technology. They are the ears and eyes of the organisation. With their interpersonal skills that allow them to make connections and build relationships – both in the workplace with colleagues and teams, as well as with clients – they have a keen sense of who needs what.

Future

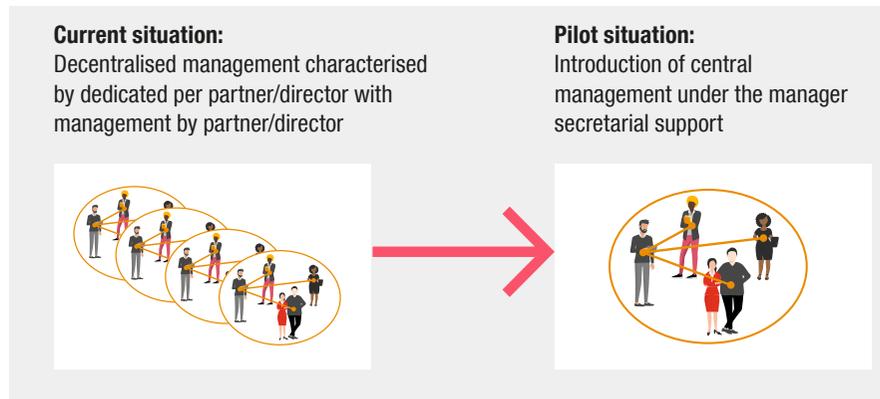
In the future, we will use technology not only to make our work easier but also to have some of the work done for us. This will be achieved through the use of Artificial Intelligence, such as ChatGPT, which will take over many tasks. By leveraging tools and technology, task execution will fade into the background, providing assistants with space for other matters, such as being a sparring partner in terms of time management and well-being. Assistants can focus more on the social and emotional aspects of their work, enabling them to collaborate more closely with their stakeholders and communicate on an equal level.

1.2 Business Support before 2013

Let us go back in time to 2011: at that moment in time, there were about 300 secretaries working at PwC. All of them in different departments, in what we call our Lines of Services, consisting of Advisory, Tax & HRS, and Assurance. In these departments, one or more secretaries work for their stakeholders, and these stakeholders themselves are responsible for their secretaries themselves. This means that they manage their secretaries and are their direct supervisors.

You can probably imagine that this led to a non-standardised approach. If a stakeholder thought they needed an extra secretary, they arranged it themselves. And while some stakeholders invested a lot of time and energy in the development of their secretaries through training and courses, others did nothing. As you can imagine, there was a great deal of inconsistency and arbitrariness.

Figure 3: The situation in 2011 according to the idea of centralisation



1.3 Reason for centralisation of Business Support

Eventually, it became clear that something had to be done to improve the efficiency and effectiveness of PwC's secretarial support. As it stood, the secretarial support was organised in different ways and the quality varied. The following factors played a role:

- The job profile no longer matched the tasks.
- The role of the secretary changed. They not only did much more themselves, but there were also new IT tools that influenced their role.
- There was no clear career path.
- The authority and communication structure were unclear.
- The content of work and the approach differed between secretaries and departments.
- Secretaries were not managed by an expert in their own field.

Our goal in early 2011? We wanted a new organisational structure for secretarial support that would provide high-quality services in an effective and future-proof manner. The new structure should provide clarity in roles, align tasks, provide clear management, objective evaluations and promotions, offer career opportunities, and, of course, ensure satisfaction among all employees. We also felt – and still do – that it is our duty as an employer to keep employees relevant in the job market.

2. The centralisation approach and the transition process to Business Support

2.1 Process of centralisation

To achieve the centralisation of Business Support with this ultimate goal in mind, we established a solid project structure with identified improvement goals. Centralising all secretaries into one department was a significant and challenging project. Therefore, we decided to start with a pilot for the organisation and implementation in the Rotterdam and The Hague offices. We transitioned from decentralised management by a stakeholder to a team structure with central management by a manager of secretarial support.

Figure 4: From a decentralised structure to the new structure with central management



To inform all secretaries and stakeholders, we gathered everyone for the project announcement. We explained the reasons as to why we were centralising and what everyone could expect. This done, we could start. Below, you can read our approach to a centralised Business Support step by step.

1. Assessing tasks and needs

A good start is half the work! We began by assessing the tasks and support needs of the stakeholders and secretaries.

2. Determining management and organisational structure

We formed new teams, taking into account collaborations, tasks, and the position in the organisation and department where someone worked.

3. Developing job profiles

Based on the required competencies and tasks, we developed new job profiles for the secretaries, as seen in figure 4.

4. Pilot organisation and implementation

The setup of the pilot could begin! We started by informing the participants of the pilot in Rotterdam and The Hague. This done, we could start matching. We conducted one-on-one interviews to determine which secretary fitted into what job profile and what their ambitions, desires, and competencies were. Based on these interviews, secretaries were assigned to their new job profiles, and we appointed managers and team leaders.

5. Optimisation of the organisation and working methods and evaluation

Because we only conducted the pilot in the offices of The Hague and Rotterdam, we were able to compare all activities and execution with the 'old' management in the other offices. We evaluated and optimised the organisation and working methods, and although the new model worked, we realised that it would be a continuous work in progress.

6. 1 September 2013: complete centralisation of all secretaries within PwC

The successful pilot ensured that, from 1 September 2013 onwards, all secretaries within PwC Netherlands were placed under a centralised Business Support department. Each secretary had a new job profile as an assistant and there was a uniform growth model and a clear management and communication structure.

In the following years, we further developed the central support model and implemented further standardisation of processes. During this period, we also continued to think about the organisation of our new Business Support. Although centralisation was a big and important step, we quickly realised that there were more possibilities and improvement opportunities. We saw that the field was constantly changing and that we had to continue evolving to remain relevant.

Four-way research

In 2016, we decided to conduct research along four paths to discover the stakeholders' opinions, identify potential for improvement and explore opportunities. We examined trends in the business support market internally within PwC Netherlands, we looked at the needs of our stakeholders and assistants, and we also analysed how PwC internationally managed their Business Support departments. Because we recognise the importance of learning from others, we decided to conduct this research externally at other companies in the Netherlands. The research results confirmed our own conclusion: this secretarial service was not sufficiently future-proof.



2.2 Vision 2020

In a world that is rapidly evolving under the influence of technology, standing still is not an option. As the digital storm increased in strength, we at PwC realised that we had to change course to remain relevant and valuable to both our clients and our own employees. This gave rise to ‘Vision 2020’: a bold journey into the future, driven by the desire to adapt to change through technological progress. Business Support had to become a continuously evolving organisation, anticipating the changes within PwC and the market.

In the case of Vision 2020, there was an extensive foundation of research and insights ready to be translated into concrete steps and tangible results. To achieve this transition, we divided the complex process into six sub-projects. Each sub-project made a crucial contribution to realising the vision. Concretising the vision required a structured approach. And how did we do that? We asked Véronique Meffert. She has been working at PwC for over sixteen years and is one of the project managers of the Vision 2020 project. She can tell us about the approach and implementation of this new service like no other.

Project initiation

Véronique Meffert: “With Vision 2020, we wanted to put the right people in the right place so that everyone is empowered. We wanted to continue anticipating the changes in our field. The transition was a fairly large project, of which I was one of the project managers. The transition process had to be a flexible and non-pushy programme; we wanted enough time for a smooth transition with a lot of attention to individual people and their wishes. We set up project teams under the leadership of a programme and project manager. Together, they were responsible for translating the vision into tangible actions and results. We developed six sub-projects, which served as building blocks for the practical



Veronique Meffert

implementation of Vision 2020. Each sub-project, such as setting up our virtual and expert team, addressed specific aspects of the transformation and focused on mapping out the necessary steps. Each team member was responsible for a specific sub-project and worked on developing that part. To provide clear guidelines and focus for each sub-project, we created a project canvas. This canvas included essential elements such as the project’s goal, the intended impact, the concrete actions we needed to take, and the expected costs. It served as a guide for the team and ensured a structured approach to turning ideas into reality.”

Collaboration

“Collaboration within the project team was essential. The teams met periodically to discuss progress, share challenges, and celebrate successes. These meetings served as a mechanism to monitor progress and ensure seamless integration of the different sub-projects. The programme manager played a crucial role in bringing all the loose ends together and ensuring that each sub-project aligned harmoniously with the overarching vision. This was vital to ensure a coordinated and cohesive effort.”

Competency framework and scan

“Since the centralisation, we categorised assistants under management assistants I and management assistants II. With Vision 2020, we re-evaluated the responsibilities of assistants and, in collaboration with an HR service provider in the business support field, developed a competency framework. This framework described competency levels based on responsibilities and tasks. It served as the basis for creating our current job profiles, including customer, hub and expert assistants. The competency scan, conducted during the rollout of Vision 2020, helped us identify the core competencies and determine the most suitable job profile for each individual.”

Rollout of Vision 2020

“In 2018, after all the preparations, we were able to proceed. With the competency framework in place, it was time to implement Vision 2020 department by department. The entire rollout process consisted of three phases and took a maximum of fourteen weeks. In phase 1, we gathered information by conducting personal interviews with stakeholders about their support needs and exploratory conversations with assistants about their ambitions. Phase 2 focused on ensuring the right person was in the right position. The third and final phase centred around training, providing all stakeholders and assistants with training on the new way of working.”

Change management

“In addition to the technical aspects of the transformation, we also paid attention to the human factor. Change management became an integral part of the process. The project team underwent training in change management, preparing them for the mental and cultural shifts that accompanied the implementation of Vision 2020. This approach ensured that we applied theoretical knowledge practically in leading changes and inspiring employees to embrace the new vision.”

Leadership programme

With Vision 2020, our focus shifted from task-oriented to responsibility-oriented leadership. Change in the workplace requires a change in leadership and collaboration style for both management and the project teams. Therefore, we engaged an external party to provide a leadership programme.

The team leaders of Business Support played a crucial role during the implementation of Vision 2020. They interacted with the assistants on a daily basis to guide, motivate, and involve them in the new vision.

Natascha Watson, a team leader in Business Support, was closely involved. Natascha said, “A new vision requires a new way of leadership. During the rollout, we used a leadership programme based on the ‘Lencioni Pyramid.’ This pyramid was developed by American organisational consultant Patrick Lencioni. We identified the main pitfalls for our teams when working towards a successful and effective team.

Leading by example, ‘doing what you preach’ was crucial in my role as a team leader. As a team leader, I was very focused on the change and wanted to ensure that everyone embraced our new vision. After all, we were facing many new things. But by having open and honest conversations with the assistants and also acknowledging that I found it challenging but had full confidence in it, I contributed to this.”



Natascha Watson

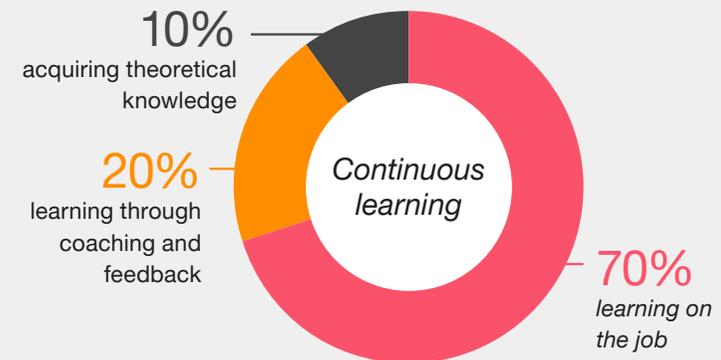
2.3 Continuous learning

Although a solid foundation of tasks is essential for assistants, we see potential in expanding their responsibilities. We encourage and guide assistants to take initiatives, operate autonomously within their role, and develop through coaching. We believe continuous learning is crucial; it provides assistants with the space to deepen their expertise and learn new things that will benefit them in the future. Therefore, since Vision 2020, we have implemented the continuous learning principle, focusing on the personal development of our employees.

The process of continuously expanding your knowledge and skills is continuous learning. It involves not only developing new skills and knowledge but also strengthening what has been previously learnt. Continuous learning not only aligns seamlessly with Vision 2020 but is also important for remaining competitive. In today's organisations, it is crucial to continuously adapt to changing social and economic conditions. We are well aware that the success of our organisation depends on our employees. Therefore, we consider it necessary to continue investing in healthy, happy, and engaged employees, with a focus on evolving their skills and continuous personal development.

The continuous learning curriculum was developed in collaboration with our Learning & Development department. It describes how PwC offers appropriate learning and development solutions. This curriculum is based on the 70:20:10 learning principle, which states that learning is most effective through a combination of different learning experiences divided into three ratios: 70% experiential learning, 20% social learning, and 10% formal learning.

Figure 5: Continuous learning through the 70:20:10 principal



70% experiential learning: learning on the job

We believe that 70% of learning takes place in the workplace, through learning by doing. This involves acquiring skills and knowledge while working. It is a practical way of developing through learning from colleagues and vice versa.

20% social learning: learning through coaching and feedback

This includes interaction and collaboration with colleagues, mentors, coaches, and other forms of informal learning within the work environment. Discussions, feedback, knowledge sharing, and collaboration contribute to this form of learning.

10% formal learning: acquiring theoretical knowledge

The remaining 10% consists of formal learning, such as classroom training, online courses like Good Habitz with over one hundred training modules, and subject-specific events and workshops offered by PwC.

3. Insights from Business Support

3.1 The achieved goal

In this first part of this whitepaper ‘The Evolution of PwC Business Support,’ we described our journey as Business Support within PwC. It has been a beautiful but challenging journey that will never end. In fact, this is one of the key points that emerges from this whitepaper: our continuous commitment to evolution and progress.

Business Support has evolved from a decentralised stand-alone secretarial support to a centralised unit that constantly adapts to changes within and outside PwC. The goal of creating a new organisational structure for secretarial support that delivers high-quality services in an effective and future-proof manner has been achieved.

The new service provides new insights and many benefits. In the area of learning and development, we continuously develop talent and service. Financially, we have achieved savings through natural attrition and the implementation of the service delivery model, resulting in cost savings and efficiency measures. Additionally and importantly, with our current Business Support, we contribute to happy and engaged employees. We share our extensive insights in the second part of the whitepaper.

We hope that this whitepaper has been a source of knowledge, information, and inspiration for everyone striving for continuous growth.



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