



Generative AI for  
Shared Services & GBS

# Generative AI for Shared Services & GBS

Prepare Your SSO for the Next Technological Revolution

September 17 - 19, 2024 | Houston, Texas

The Royal Sonesta Houston Galleria



The Only Event Dedicated Exclusively to Generative AI in Business Services. Period.

*In Partnership with Shared Services & Outsourcing Week*

**Earn Up to 17 CPE Credits**

# WELCOME

## GBS & SHARED SERVICE LEADERS COMMUNITY!

I'm thrilled to announce Generative AI for Shared Services & GBS, happening this September 17-19, 2024, in Houston, Texas – and I couldn't be more excited to have you join us!

We've all witnessed the transformative power of automation, but Generative AI (GenAI) is poised to be a game-changer unlike anything we've seen before. It's not just about automating tasks; it's about unlocking a whole new level of **proactive decision-making** and **increased efficiency** within GBS and Shared Services.

Imagine a future where AI doesn't just complete tasks, but **understands your data, anticipates needs, and even generates solutions** before problems arise. That's the power of GenAI. At Generative AI for Shared Services & GBS, we'll be diving deep into this incredible technology, where we're already seeing use cases, and the internal and external tools you need to start implementing it.

In partnership and co-located with Shared Services & Outsourcing Week (SSOW), we've curated an experience specifically designed for GBS and Shared Services leaders like you. **Engage with the masterminds** who are shaping the future of business services with GenAI. Explore **never-before presented case studies** that showcase its real-world impact.

**Whether you're a curious newcomer or a seasoned navigator**, walk away with a **battle plan** to implement GenAI and gain a strategic advantage in your organization.

Join us, and let's unlock the true potential of GenAI!



**Kayla DelPizzo**

Market Analyst & Conference Producer  
SSON

# MEET YOUR HOST

As your Chairman, drawing from my **20+ years** of extensive experience in IT and as a LinkedIn thought leader in intelligent automation and generative AI, I am thrilled to guide you through an insightful exploration, grounded with some hands-on experience and logic around these cutting-edge technologies.

Our conference program has been carefully curated to bring together intelligent automation and AI/GenAI. With a focus on key aspects such as **data models, monitoring GenAI pilot successes, navigating change management, addressing risks and ethical considerations, and showcasing practical use-cases**, our goal is to equip you with actionable insights to initiate successful GenAI implementations within your Shared Services Organization (SSO).

Together, we will explore proactive strategies for **optimizing work processes, harnessing predictive maintenance, and enhancing version control** while harnessing the transformative potential of GenAI.



**Doug Shannon**

Global Intelligent Automation  
and GenAI leader

# LEARN FROM TRENDSETTING SPEAKERS



**Eleodor Sotropa**  
Consumer and Market Knowledge Group Director - Global Service Leader  
**P&G**



**Deepa Abi**  
Head of North American GBS  
**The Kraft Heinz Company**



**Tim Young**  
Head of HR Operations  
**Pearson**



**Jon Eisenstein**  
Senior Vice President of Product  
**FIS**



**Ricardo Wolf**  
Vice President, Global Business Services/ Digital Factory  
**Pepsico**



**Cristopher Taylor**  
Senior Global Human Resources - Operational Excellence Leader  
**Paypal**



**Samir Bagri**  
Vice President, Transformation  
**CBRE**



**Christopher Koch**  
Director of HR Tech & People Analytics  
**BSW**



**SSON Impact Awards**  
2024 WINNER:  
AUTOMATION



**Kishore Koduri**  
Senior Director, Enterprise Architecture & Shared Services  
**Ameren**



**Dhruval Shah**  
Former Head of Robotics Center of Excellence - New Technology Development & Innovation  
**AT&T**



**Swarna Kuruganti**  
Former Director Digital Innovation  
**Moffitt Cancer Center**



**Subbiah Mahalingam**  
Vice President, Digital Transformation  
**BD**



**Naomi Secor**  
Global Managing Director  
**SSON**



**Nick Ploch**  
Global Process Owner, QTC  
**Brinks**



*"One of the highlights of SSON events" from me has been all the focus on generative AI. There's so many use cases that I've been able to learn about and I'm really excited to see how I can take this information back to our organization as I continue to build out our strategy and design for HR operations and shared services."*

**- Vice President, HR Operations & Shared Services, Danaher Corporation**

Shared Services & Outsourcing Week, March 2024

# TRAILBLAZING ADVISORY BOARD

Our GBS/SSO Advisors bring a wealth of knowledge and experience from across multiple industries to help us shape and build content that is fit for the evolving GenAI community.



**Dhruval Shah**

*Former Head of Robotics Center of Excellence - New Technology Development & Innovation*

**AT&T**



**Doug Shannon**

*Global Intelligent Automation and GenAI leader*



**Markus Baumgartner**

*Chief Financial Officer  
Ebner Group*



**EBNIER® GROUP**  
Driving Green Technologies



**Michelle Irwin**

*Head of Future of Work & Communications for the Americas Region*  
**Siemens**



**Peter Galik**

*TBS Global Head of Innovation, Analytics, and Automation*  
**Takeda**



**David Palmieri,**

*Managing Director,  
Head of GBS & Product Engineering Excellence*  
**Experian**

**SIEMENS**

**Takeda**

**experian**

*"If you don't get outside of your own walls, you don't know what exists. The thing that I particularly like about SSON is the level of participant and the level of discussions that we have. We really find great solutions and we find fantastic connections. Connections throughout the industry that really helped throughout our career whether we're with the same organization or we move on, that community still exists and that's extremely important."*

**- Rob Bradford, Vice President of Global Business Services, Centine Corporation**

Shared Services & Outsourcing Week, March 2024

# MAKE INFLUENTIAL CONNECTIONS



# FOUR STAGES OF GENAI IMPLEMENTATION

## 1 “Stand”

- Observe new technologies and capabilities
- Evaluate potential within the organization and cost to implement
- Identify use cases that do not require absolute precision like information retrieval

## 2 “Walk”

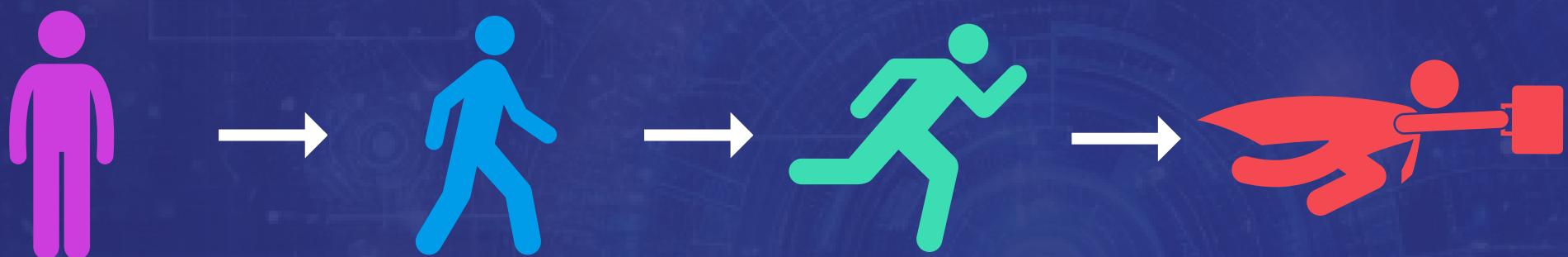
- Streamline your data ingestion and processes across your entire organization
- Prepare workforce through upskilling on new technologies
- Pilot use-cases within functions, typically those that do not require precision

## 3 “Run”

- Break down silos between functions and create a bridge between business units
- Some business units may implement GenAI and are starting to operate with precision
- Identify any privacy and ethical concerns as you start to utilize GenAI in more precise, and cross-functional tasks

## 4 “Fly”

- GenAI has become ubiquitous across the enterprise and is used evenly across the organization
- Ethical and privacy frameworks are in place
- Workforce is well equipped to manage new GenAI technologies



# KEY THEMES DRIVING TRANSFORMATIVE STRATEGIES

## Generative AI Essentials

From data modeling to business case development, risk management, and workforce transformation, gain a comprehensive understanding of GenAI and its applications.



## Business Value & ROI

Build a strong business case, monitor performance, manage costs, and measure ROI. Learn how to quantify the impact of GenAI on your business and ensure a positive ROI.



## Ethics & Responsibility

Emphasize data privacy, build trust, and establish ethical guardrails.



## Workforce Transformation

Navigate the shift in job roles and responsibilities, explore strategies for training and upskilling team members, and foster an adaptable culture that embraces change



## GenAI Implementation Strategies

Gain insights from industry experts and learn how to successfully implement GenAI in your organization.



# UNMISSABLE BENEFITS AWAITS

## BE THE FIRST TO BE IN THE KNOW

Learn how others are implementing GenAI through **never-before presented Gen AI Use Case Spotlights**.

## EXPLORE THE INNOVATION HUB

Our re-designed exhibit floor is where you'll find cutting-edge solution providers and **GenAI technologies** that will enable your team to tackle almost any challenge.

## 3 EVENTS UNDER 1 ROOF

Take advantage of our co-located events by popping into **Shared Services & Outsourcing Week** or **Higher Education Shared Services & Outsourcing Week** running concurrently when there is a session you're dying to see.

## JOIN THE DISCOURSE THROUGH INTERACTIVE DISCUSSION GROUPS

**Small, targeted roundtables** where speakers delve deep into the most current market challenges and discover how best to overcome them.

## ATTEND PRE-CONFERENCE WORKSHOPS

The Workshops will equip you with the knowledge and skills in **Data Ingestion, Evaluating Business Cases, Risk & Privacy, and Workforce Management** to conquer your GenAI challenges and emerge a champion within your organization.

## LEVEL-UP YOUR KNOWLEDGE & BECOME A GENAI LEADER IN YOUR SSO

Join the ranks of visionary leaders who are shaping the future with GenAI. **Discover strategies and goals for building a responsible and forward-thinking GBS.**

## EARN UP TO 17 CPE CREDITS

Penton Learning Systems, dba International Quality and Productivity Center (IQPC) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE.

Sponsors through its web site: [www.nasbaregistry.org](http://www.nasbaregistry.org)

**Prerequisites:** Basic knowledge of business services within any industry.

**Advanced Preparation:** None

**Program Level:** Intermediate

**Delivery Method:** Group Live



*In Partnership with...*

# SHARED SERVICES & OUTSOURCING WEEK

## Market Perspective

You're meeting people with shared KPIs and objectives. It's really nice visibility to get in the industry and see what other players there are, what people are actually looking for and gain market research perspective.

## Level Up Your Team

Dive into hands-on workshops that hone your skills, connect with diverse minds who challenge your perspective, and unlock the power of collaboration through interactive challenges that push boundaries and spark innovation.

## Learn Top Trends Influencing Senior Leadership

Navigate the future confidently by diving into the most pressing trends and issues shaping the senior leadership landscape. This is your chance to stay ahead of the curve directly from industry visionaries and experts. Take advantage of this unparalleled learning opportunity!

## Benchmark With Your Peers

Benchmarking is more than a buzzword—it's a catalyst for improvement. Our conference offers a unique setting to measure your strategies and performance metrics against the industry's best. Gain actionable insights from peer-to-peer exchanges and level up your leadership game.



# AGENDA AT A GLANCE

[VIEW THE FULL AGENDA](#)

## Pre-Conference Workshop & Experiences Day - **Tuesday, September 17**

8:00 am Registration and Networking Breakfast

9:00 am **GenAI Essential 1: Data Workshop | Tailoring Models for GenAI vs. Organizations**  
*Subbiah Mahalingam, Vice President, Digital Transformation, BD*

10:30 am Networking Break

11:00 am **GenAI Essential 2: Business Case Workshop | Building Your Business Case, Monitoring Success, and Managing Costs**  
*Swarna Kuruganti, Former Director Digital Innovation, Moffitt Cancer Center*  
*VOCAL (Voice of Customer in the Automation Landscape) is a peer powered global community of decision makers and users of Automation technologies including Generative AI.*

12:30 pm Networking Lunch

1:30 pm **GenAI Essential 3: Risk Workshop | Building Trust and Automation for Responsible GenAI**

3:15 pm Networking Break

4:00 pm **GenAI Essential 4: Workforce Management | Developing Your GenAI-Driven Workforce Transformation**  
*Deepa Abi, Head of North America GBS, The Kraft Heinz Company*

5:00 pm End of workshops

# AGENDA AT A GLANCE

[VIEW THE FULL AGENDA](#)

## Main Day One - Wednesday, September 18

8:00 am Registration and Networking Breakfast

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9:00 am **Chairman Opening Remarks**

*Doug Shannon, Global Intelligent Automation & GenAI Leader, [PSI-CRO](#)*

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9:05 am **GenAI Unveiled: SSON Research & Analytics Reveals the 9 Big Discoveries you Need to Know Now!**

*Naomi Secor, Global Managing Director, [SSON](#)*

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9:35 am **A Practical First 90-Day Plan for Your GenAI Implementation in Shared Services**

*Eleodor Sotropa, Senior Director, Global Leader AI Accelerator, [Procter & Gamble Company](#)*

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10:10 am Networking Break

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10:50 am **GenAI Opportunity Spotlights**

These sessions highlight how generative AI is revolutionizing SSOs by diving into how generative AI can be applied to various SSO functions

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11:30 am **Use Case: Introducing Pearson's GenAI-powered Scheduling Assistant**

*Tim Young, Head of HR Operations, [Pearson](#)*

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12:00 pm **Use-Case: Introducing Eva, PayPal's Versatile Virtual Agent**

*Cris Taylor, Senior Global Program Manager - Operational Excellence - HR Employee Central, [PayPal](#)*

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12:30 pm Networking Lunch

# AGENDA AT A GLANCE

[VIEW THE FULL AGENDA](#)

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1:30 pm **The 5+1 Strategy: Valuable Lessons from Unsuccessful Generative AI Pilots**

2:00 pm **IDGs: Choose from four GenAI Topics**

1. Ensuring Ethical Integration of GenAI in Shared Services and GBS
2. Citizen-Led Strategies for Successful GenAI Adoption
3. Cross-Functional Collaboration for GenAI Readiness in Shared Services and GBS
  - *Nick Ploch, Global Process Owner, QTC, Brinks*
4. Legacy Software Challenges When Integrating GenAI in Shared Services and GBS

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3:25 pm Networking Break & Demo Drive

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4:00 pm **Panel: Unlocking the GenAI Treasure Chest: Practical Applications for Shared Services Leaders**

*Christopher Koch, Director of HR Tech & People Analytics, Baylor Scott and White (BSW) Health*

*Kishore Koduri, Senior Director, Enterprise Architecture & Shared Services, Ameren*

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5:00 pm **Closing Recap with Q&A**

*Doug Shannon, Global Intelligent Automation & GenAI Leader, PSI-CRO*

# AGENDA AT A GLANCE

[VIEW THE FULL AGENDA](#)

## Main Day Two - Thursday, September 19

7:50 am Registration and Networking Breakfast

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8:50 am **Chairman Opening Remarks**

*Doug Shannon, Global Intelligent Automation & GenAI Leader, [PSI-CRO](#)*

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9:00 am **The Responsibility Debate: GenAI Implementation and Shared Services**

*Kishore Koduri, Senior Director, Enterprise Architecture & Shared Services, [Ameren](#)*

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9:50 am **GenAI Opportunity Spotlights**

*These sessions highlight how generative AI is revolutionizing SSOs by diving into how generative AI can be applied to various SSO functions.*

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10:30 am Networking Break & Demo Drive

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11:10 am **GenAI Opportunity Spotlights**

*These sessions highlight how generative AI is revolutionizing SSOs by diving into how generative AI can be applied to various SSO functions*

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11:40 am **Use Case: From Data to Insights: How PepsiCo Leverages GenAI to significantly streamline R&D processes**

*Ricardo Wolf, Vice President of Global Business Services/ Digital Factory, [PepsiCo](#)*

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12:10 pm Networking Lunch

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# AGENDA AT A GLANCE

[VIEW THE FULL AGENDA](#)

1:10 pm **Panel: Navigating the Black Box: GenAI Adoption with Data Privacy, Guardrails, and Ethical Considerations**

*Dhru Shah, Former Head of Robotics Center of Excellence - New Technology Development & Innovation, AT&T*

*Ricardo Wolf, Vice President of Global Business Services/ Digital Factory, PepsiCo*

*Deepa Abi, Head of North America GBS, The Kraft Heinz Company*

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2:10 pm **Use-case: From Rejection to ROI: Google HR's Success Story with GenAI**

*Jon Eisenstein, Senior Vice President of Product, FIS Former Product Group General Manager, Google*

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2:50 pm **Panel: Beyond the Basics: GenAI When will GenAI Show its Full Potential in Shared Services & GBSOs**

*Jon Eisenstein, Senior Vice President of Product, FIS Former Product Group General Manager, Google*

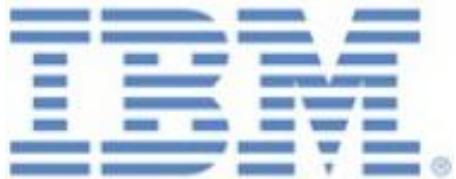
*Eleodor Sotropa, Senior Director, Global Leader AI Accelerator, Procter & Gamble Company*

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3:20 pm End of Conference

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# MEET OUR PAST LEADING SOLUTION PROVIDERS



## INTERESTED IN SPONSORSHIP OPPORTUNITIES FOR THE GENERATIVE AI FOR SHARED SERVICES & GBS CONFERENCE?

Reach out to our team to learn more about attendee stats, sponsorship opportunities, testimonials, and more.

Let us help you maximize your ROI at the conference.



**Shah Zaman**  
Managing Director,  
Strategic Partnerships  
[shah.zaman@ssonetwork.com](mailto:shah.zaman@ssonetwork.com)

# PRICING & REGISTRATION

END-USERS - GENERATIVE AI FOR SHARED SERVICES & GBS	Register & Pay by June 14	Standard
<b>GOLD: MAIN CONFERENCE</b>  Including: Main Conference + Interactive Discussion Groups + Panel Discussions + Breakfast & Lunch + Networking Opportunities + Innovation Hub + Networking Receptions + Event App & Digital Takeaways + Access to co-located conferences	\$1,499 <b>Save \$2,100</b>	\$3,599
<b>PLATINUM: ALL ACCESS PASS</b>  Including: Workshop Day + Main Conference + Interactive Discussion Groups + Panel Discussions + Breakfast & Lunch + Networking Opportunities + Innovation Hub + Networking Receptions + Event App & Digital Takeaways + Access to co-located conferences	\$2,499 <b>Save \$2,100</b>	\$4,599
VENDORS & SOLUTION PROVIDERS	Standard	
<b>GOLD: MAIN CONFERENCE</b>	\$4,299	

## 3 EASY WAYS TO REGISTER

1. Email: [enquiry@iqpc.com](mailto:enquiry@iqpc.com)
2. Call: 1 (866) 232-8660
3. Visit: <https://www.ssonetwork.com/events-generative-ai-shared-services/srspricing>

## Speakers & Program



**Kayla DelPizzo**  
Market Analyst &  
Conference Producer  
[kayla.delpizzo@ssonetwork.com](mailto:kayla.delpizzo@ssonetwork.com)

## Audience Development



**Julia Falkenburg**  
Head of Delegate Acquisition  
[julia.falkenburg@ssonetwork.com](mailto:julia.falkenburg@ssonetwork.com)

## Marketing



**Ted Michael Gregory**  
Events Marketing Director  
[ted.gregory@iqpc.com](mailto:ted.gregory@iqpc.com)

## Sponsorship



**Shah Zaman**  
Managing Director,  
Strategic Partnerships  
[shah.zaman@ssonetwork.com](mailto:shah.zaman@ssonetwork.com)

**REGISTER**