

# YOUR SSOW AGENDA



SSON is recognized by SHRM to offer Professional Development Credits (PDCs) for SHRM-CP® or SHRM-SCP® recertification activities

**Prerequisites:** Basic knowledge of business services within any industry.  
**Advanced Preparation:** None  
**Program Level:** Intermediate  
**Delivery Method:** Group Live

## Pre-Conference Workshops and Main Day One - Tuesday, September 16, 2025

### WORKSHOPS

8:30 am Workshop Registration

9:00 am **Morning Workshops** - pick 1

#### Workshop A

Close the Gaps in R2R Automation:  
Insights from New Research

Hosted by: **Redwood**

#### Workshop B

Essential Strategies for a Shared Services  
Organization to Thrive in Any Market Condition

Hosted by: **scottmadden**  
MANAGEMENT CONSULTANTS

10:30 am Mid-Morning Break and Networking

11:00 am **Afternoon Workshops** - pick 1

#### Workshop C

Untangle Your Processes: 90 Minutes to  
Shared Services Optimization

*Speaker: Tony Hiatt, Director of Shared  
Services, **Granite Construction***

#### Workshop D

Simplify HR Transformation and Enhance  
the Employee Journey

12:30 pm End of Workshops and Luncheon for Workshop Attendees

### SSOW OPENING

1:30 pm **SSOW/Chairperson's Opening - Main Event**

1:45 pm **Reclaim Your Resources: Strategic Process Optimization for High-Value Work**  
*Todd Ferraro, Global Vice President, Global Operations & BPO, **Verint-Systems***

# YOUR SSOW AGENDA

2:15 pm **People, Not Just Platforms: Digital Transformation Done Right**  
Hosted by **Leena AI**

2:45 pm Networking Break

3:30 pm **The Power of Perception: Communicating IT Success in a Transforming World**  
Larry Hack, Senior Vice President, Shared Services, **PriceSmart**

4:00 pm **Nokia GBS Transformation: Proving Value Through Expansion, Portfolio Innovation, and Customer-Centric Change**  
Carolina Okrongli, Head of Strategy & Chief of Staff, Nokia Business Services, **Nokia**  
Rod Lindsay, President, Nokia Business Services, **Nokia**

4:30 pm **The SSO & GBS Hot Take Hustle**

5:30 pm Close of Day One and Welcome Reception

## Main Day Two - Wednesday, September 17, 2025

8:00 am Breakfast and Networking

9:00 am **The Future of Shared Services: Driving and Proving Value in the Age of Technology**  
Guy Babbitt, Senior Vice President Shared Business Services, **US Foods**  
Karen Davis, Vice President, Contact to Resolution (Shared Business Services), **US Foods**

9:40 am **The 2025 State of the Shared Services & GBS Industry Survey & Highlights**

10:10 am Networking Break and Demo Drive

10:40 am **Interactive Discussion Groups (IDGs) - pick 2** ⬇️⬇️

### IDG 1

Rethinking Risk, Spend & Compliance in the Age of AI-Powered Shared Services

Nathanael L'Heureux, Chief Solutions Ambassador, **Oversight**

Hosted by:  Oversight  
Nothing gets by you now

### IDG 2

How Can I Overcome the Challenges of Moving From Manual to Technology-Driven Processes?

Sam Cohen, Senior Director, Transformation GBS, **Otis Elevator Co**

### IDG 3

Why Enterprises Are Going Beyond AI Agents to AI Employees?

Kenneth Upchurch, Advisor, **Supervity**

Hosted by:  Supervity

### IDG 4

Transform Outcomes through End-to-End BPO Partnerships

Derek Aranda, Supply Chain Leader, **Formerly Shell**

### IDG 5

Strategic AI for Indirect Tax: Moving Past Pilots to Trusted Adoption

Hosted by:  Thomson Reuters

### IDG 6

Execute a Global Process Strategy to Ensure Efficiency and Alignment Across Operations

Johnnie Moore, Former Head of Global Service Center Business Partner Management Americas, **DHL**

### IDG 7

Is Shared Services at a Crossroads? How Finance is Transforming in the AI Era

Josh Heenehan, AP Solutions Consultant, **Vic.AI**

Hosted by:  VIC.AI

### IDG 8

The AI Payback Clock: Fund Accuracy Upstream

Hosted by:  ADLIB

# YOUR SSOW AGENDA

12:15 pm Networking Luncheon

1:15 pm Process Tracks - pick 1 

## Data

The HR Analytics Toolkit:  
Engagement and Self-Service

Hosted by:  **herronpalmer**

## Process Excellence

From “As-Is” to “To-Be”: Standing Up  
HR Shared Services to Drive  
Operational Excellence at Scale

*Zachary Larson, Senior Director, People  
Strategy, Analytics, & Innovation, **First  
Student Inc.***

## Workforce Management

The New Hire Experience:  
Comprehensive Onboarding  
Strategies

*EJ Santos, President, FBS, **Farmers  
Insurance***

1:55 pm Process Tracks - pick 1 

## Data

The Hidden Catalyst in GBS Transformation:  
Trustworthy, Empirical Data  
*Khiv Sewad, Country Manager & SVP, United  
States, **ProHance***  
*Anand Baradwaj, Executive Director,  
**Guidehouse***

Hosted by: **PROHANCE**

## Process Excellence

GBS Evolution: Optimizing Processes for  
Finance

*Anita Espinosa, Finance Manager, **Creditsafe***  
*Michael Krogermeier, CFO, **Creditsafe***

Hosted by:  **BLACKLINE**

## Workforce Management

Building Talent for Transformation:  
Creating a Competency Framework to  
Power Digital Change

*Jesus Villalobos, Continuous  
Excellence Lead GBS Americas, **Kerry  
Americas***

2:30 pm Process Tracks - pick 1 

## Data

Accelerating O2C with AI – From  
Collections Chaos to Cash Flow Clarity  
*Juliano Godoy, General Manager,  
**Phillips 66***

## Process Excellence

Global O2C: A Universal Language  
for International Success

*Nicole Sherwood, Finance Director,  
**ABS***

## Workforce Management

Level Up Your Team: Skills for the  
Future

*Reeta Pattanaik, Vice President,  
**Cencora***

3:00 pm Networking Break

# YOUR SSOW AGENDA

3:30 pm **How Do We Get the Data?: A Multifunction Assessment of Workforce Efficiency**  
*Dahlia Rigsby, Director, Finance Shared Services, **West Fraser***  
*Hosted by **ScottMadden***

4:15 pm **The Collaboration Imperative: How Catalent's Global Process Owners Are Powering the Future of Finance**  
*Rachael Thorley, Director, GPO, R2R, **Catalent***  
*Eric Joyner, Director, GPO, O2C, **Catalent***  
*Florian Bejko, P2P Process Owner, **Catalent***

4:45 pm **AI Straight Talk Panel: Capabilities and Roadblocks within Shared Services**  
*Jeff DeWolf, Director, Global Process Office, **Tetra Pak Group***  
*Rick Stevens, Director of Procurement, **Indeed.com***  
*Hosted by **Simplify IA***

5:15 pm Drinks Reception

## Main Day Three - Thursday, September 18, 2025

8:00 am Breakfast and Networking

9:10 am **Panel: The New Metrics: Measure Strategic Value in Shared Services**  
*Moderator: Ian Thompson, Owner, **Clear Cycle Advisors***  
*Carlos Santos, Head, North America Shared Services, **Holcim***  
*Tonia McMillan, Vice President, HR Strategy, **Amtrak***  
*Majella Lavin, Vice President, GBS, **Ball Corporation***  
*Amit Yadav, Head, GBS, **Tenneco***

9:40 am **Panel: The Modern Shared Services Leader: Influence, Innovation, Impact**  
*Moderator: Julie Schwendimann, Former Vice President of Global Shared Services Operations, **Stanley Black & Decker***  
*Valquir Correa, Vice President, Corporate Finance, **Baha Mar***  
*EJ Santos, Head, Farmers Business Services, **Farmers Insurance***  
*Sheneq Aranda, Vice President, **Cadence Bank***

10:10 am **Keynote Session: The Art of the Data Story: Moving Minds with Metrics**  
*Simon Rogers, Award-Winning Data Journalist, Data Editor, & Author, **Google***

10:50 am **Networking Break and Demo Drive Results**

11:30 am Process Tracks - pick 1 

### Data

Beyond Spreadsheets: Unlocking R2R Insights Through Integrated Data and Dashboards  
*Claudia Baqueiro, LATAM SSC R2R Director, **PepsiCo***  
*Michelle Aguilar, Control & Report Senior Coordinator, **PepsiCo***  
*Moderator: Derek Aranda, Supply Chain Leader, **Ex-Shell***

### Process Excellence

Process by Design: Creating Scalable Shared Services Through Standardization  
  
*Jeff DeWolf, Director Process Office, **Tetra Pak Group***

### Workforce Management

Beyond the Contract: Upskill, Align, and Win With Your BPO Partner  
*Robert Lynch, Director Finance Operational Excellence, **Ahold Delhaize USA***  
*Debbie DeSalvo, Director, Americas R2R Controller, **Astellas Pharma***  
*Moderator: Derek Aranda, Supply Chain Leader, **Ex-Shell***

# YOUR SSOW AGENDA

12:00 pm Lunch

1:00 pm Process Tracks - pick 1 

## Data

Turn AP into an Intelligence Hub:  
Automation as an Engine for Real-Time  
Data and Strategic Action

*Mina Gindi, Global Director of  
Finance Shared Services, **NOV***

## Process Excellence

Empower Suppliers, Streamline  
Invoices: The Self-Service Solution

*Jeff Hoffman, Source To Pay  
Operations Director & Transformation  
Lead, **AECOM***

## Workforce Management

People-Centered Change: Enabling  
Successful Technology Transitions

*Rhea Bauer, Senior HR IT Digital Consultant,  
**Bosch**  
John Wilke, Senior Vice President, Enterprise  
Technology & Digital Enablement, **Zachry Group**  
Prathap Varkey, Vice President- Shared Services,  
**JB Poindexter***

1:35 pm Process Tracks - pick 1 

## Data

From Transactions to Insights:  
How Data Analysis Adds Value  
Across Shared Services

*Mina Gindi, Global Director of  
Finance - Shared Services, **NOV***

## Process Excellence

Global R2R Standardization: Achieve  
Consistency and Efficiency

*Matt Lorey, Director,  
R2R Shared Services, **CRH**  
Yvonne Swiatek-Marcinkiewicz, Global  
Director R2R, **ADM***

## Workforce Management

Optimizing Workforce Management for  
Shared Services: Balancing Efficiency,  
Agility, and Employee Experience

2:10 pm **Build the Ecosystem of Collaboration: Breakdown Internal and External Silos for Competitive Advantage**  
*Kelly Litser, Chief Growth & Strategy Officer, **DCD Automotive Holdings***

2:40 pm Closing Recap and Final Thoughts

2:50 pm Close of Conference – **See You at the Next SSOW is in March 2026!**



# SECURE YOUR SPOT

END-USERS - SHARED SERVICES/GBS PROFESSIONALS	Standard
<b>MAIN CONFERENCE + WORKSHOPS PASS</b> Including: Main Conference + Workshops + Interactive Discussion Groups + Panel Discussions + Breakfast & Lunch Networking Opportunities + Innovation Hub + Networking Receptions	\$3,599
<b>SITE TOUR AT ONTELLUS</b>	\$99
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#### Speakers & Program



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