ss⊜n Shared Services & Outsourcing Week





Add Value. Drive Value. Prove Your Value.

YOUR SHARED SERVICES COMMUNITY

Howdy, Shared Services & GBS Professionals!

Thank you for checking out SSOW! This is where the shared services and GBS community comes together to move beyond trend-spotting and into strategybuilding.

The landscape is clear: automation and customer experience are paramount. But this year, we're challenging you to go further. We're asking: How can shared services organizations not just add value, but actively drive value, and - most importantly - prove that value to the business?

At SSOW, we're diving deep into this core question. Building on the success of our process-focused approach from 2024, this year's event allows for even more granular exploration of the most common SSO processes. This means you'll gain targeted insights that directly address your specific challenges and opportunities.

We're committed to providing you with the tools, knowledge, and connections you need to excel in today's dynamic shared services environment. Come prepared to learn, connect, and leave with a clearer roadmap for demonstrating your organization's indispensable value.

We look forward to welcoming you to Houston!

Who Should Attend?

- Chief Financial Officer
- Vice President, Service **Delivery**
- · Vice President, Shared **Services Center**
- Vice President, Finance **Digital Transformation**
- Senior Director, People **Operations**
- Senior Director, GBS
- Senior Director, Change Management
- Director, Operations
- Director/GPO R2R

- Director/GPO P2P
- Director/GPO 02C
- Director, Business **Process Improvement**



Kayla DelPizzo Conference Producer SSON



Heather King Managing Director SSON







SSOW KEYNOTE: DATA WITHOUT BORDERS

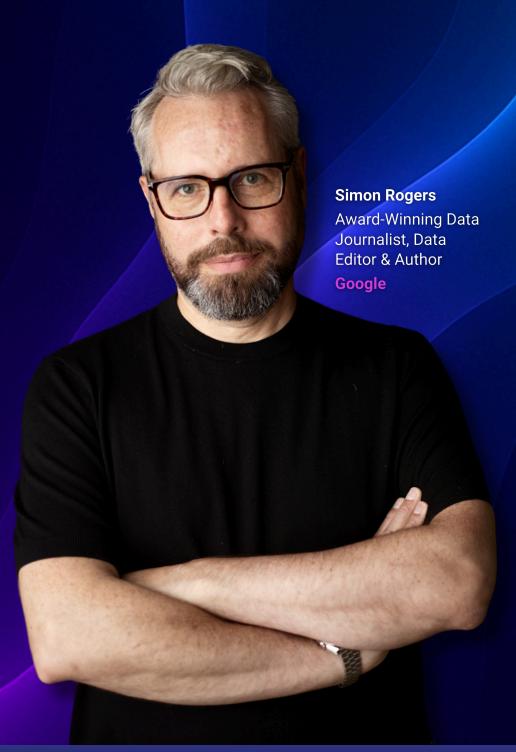
The Google Data Editor Who Turned Numbers Into Narratives—and Changed How We See the World

Simon Rogers is an award-winning data journalist, writer and speaker. Co-host of The Data Journalism Podcast and author of 'Facts are Sacred', published by Faber & Faber around the world. He has also written a range of infographics for children's books from Candlewick.

Data editor at Google, based in San Francisco, he is director of the Sigma Data Journalism Awards and teaches Data Journalism at Medill-Northwestern University in San Francisco and has taught at U Cal Berkeley Journalism school.

His latest book, What We Ask Google, will be published by Random House in 2026.

Don't miss Simon's SSOW Keynote session 'The Art of the Data Story: Moving Minds with Metrics' on Thursday, September 18, 2025, at 10:10 AM, an impactful session on turning raw metrics into compelling data stories that drive action, align stakeholders, and ignite enterprise-wide change.





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cencora



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IN RAM



AJ Wijesinghe Senior Vice President, GBS









INDUSTRY LEADING SPEAKERS



SSOW was enriching, inspiring and very well organized, with a lot of networking opportunities.

- Senior Director, Corporate Accounting, Gannett



Claudia Baqueiro LATAM SSC **R2R Director**

PEPSICO



Guy Babbitt Senior Vice President **Shared Business Services**



Sam Cohen Senior Director. Transformation GBS

OTIS



Karen Davis Vice President, Contact to Resolution (Shared **Business Services**)





Jo Anne Dimitriou Former Head. **Shared Services**



Todd Ferraro Global Vice President. **Global Operations & BPO**





Mina Gindi Global Director of Finance, Shared Services





Eric Joyner Director, GPO, O2C





Matt Lorey Director, R2R **Shared Services**



U.S. AIR FORCE

Rachael Thorley Director and GPO of R2R

Catalent.



Carlos Santos Head, North America **Shared Services**





Robert Lynch Director Finance Operational Excellence





Julie Schwendimann Former Vice President, Global **Shared Services Operations**





Larry Hack Senior Vice President. **Shared Services**





Nicole Sherwood Finance Director of O2C





Richard Cardone Director, P2P









INDUSTRY LEADING SPEAKERS



I was able to connect with a lot of different **people**, **industries**, and **services** that are going to be able to help me and my GBS further develop.

- Vice President Corporate and Business Services, Americas, Michelin



Mahen Jayarajan Former Senior Executive, Transformation, GBS, Finance & Operations



Florian Bejko P2P Process Owner

Catalent.



Jesus Villalobos Continuous Excellence Lead GBS Americas



Jairo Sancho Director, Shared Services





Valquir Correa Vice President, Corporate Finance





Yvonne Swiatek-Marcinkiewicz Global R2R Director





EJ Santos Head, Farmers Business Services

KERRY





Juliano Godoy General Manager, Agile Enterprise Services





Erika Beltran
Vice President of Shared
Service Center for LATAM,
IBERIA & USA





Debbie DeSalvo Director, Americas R2R Controller





John Wilke Senior Vice President, Enterprise Technology and Digital Enablement





Guru Mohan Vice President, Global Procurement, P2P

□toast



Jeff DeWolfDirector, Global
Process Office

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Prathap Varkey
Vice President- Shared
Services

JB Poindexter & Co



Michelle Aguilar Control & Report Senior Coodinator





Jeff Hoffman S2P, Operations Director & Transformation Lead









INDUSTRY LEADING SPEAKERS



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- Senior Director, Corporate Accounting, Gannett



Kelly Litser Chief Growth & Strategy Officer



Anand Baradwaj Executive Director Guidehouse



Amit Yadav Head. Global Business Services **TENNECO**



Sheneq Aranda Vice President



Michael Krogermeier CFO credit**safe**



Manish Nariwal COO ontellus



Reeta Pattanaik Vice President cencora



Anita Espinosa Finance Manager credit**safe**



Rhea Bauer Senior HR IT **Digital Consultant**



BOSCH



Rick Stevens Director of Procurement





Tonia McMillan Vice President, **HR Strategy**



Tony Hiatt Director of **Shared Services**

GRANITE



Dahlia Rigsby Director, Finance **Shared Services**



West Fraser



Zachary Larson Senior Director, People Strategy, Analytics, & Innovation

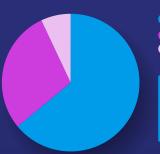






CULTIVATE INFLUENTIAL CONNECTIONS

SENIORITY LEVEL



- 64% Director & Above
- 29% Manager
- 7% Specialist

Over three-fourths of attendees are decision-makers who control or directly influence budget.

INDUSTRY



- 24% Utility & Energy
- 19% Manufacturing
- 14% Retail & CPG
- 14% Professional Services 2% Media
- 9% Healthcare & Pharma
- 6% Construction & Trans. 1% Public Sector
- 5% Technology
- 4% Higher Education
- 2% Travel & Hospitality
- 2% BFSI

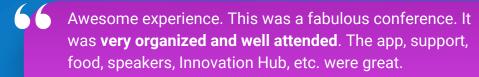
A variety of industries means even more opportunities for benchmarking

FUNCTION

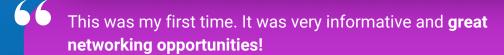


- 35% Finance
- 20% HR
- 10% GBS
- 7% Other
- 6% Transformation
- 6% Multi-Functional
- 5% Supply Chain/Procurement
- 4% Service Delivery
- 3% Operations
- 2% CI/Automation
- 2% Data/IT

Professional development thrives when your team engages in our multi-track, function-focused learning program



- Vice President GBS, Westinghouse Electric Company
- This was a great experience for myself and my team members to understand trends in the GBS industry and make some **new friends** in support of our initiatives
 - Controller, Plants and Shared Services, **Komatsu America Corp**



- Employee Services Vice President, Nokia











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VIEW ATTENDEE SNAPSHOT



Access to SSO Execs

Forge invaluable connections with senior shared services and outsourcing (SSO) executives. Expand your professional network, exchange best practices, and build strategic partnerships that can propel your career and organization forward.

Benchmark in Real Time

Gain immediate insights into industry benchmarks and performance metrics. Participate in live polling and interactive sessions to compare your organization's performance against leading shared services models, empowering you to identify areas for improvement and drive tangible results.

TOP **REASONS** TO ATTEND

Case Studies on Shared **Services Adding Value**

Collaborate with like-minded leaders from across North America and join the largest network of Shared Services & GBS professionals. Exchange ideas, discover proven strategies, and discuss real-world examples of how shared services are driving value across diverse industries. Learn from in-depth case studies presented by leading organizations, showcasing innovative approaches to cost reduction, process optimization, and strategic growth.

Technology Showcase & Innovation Hub

Explore the latest shared services technologies and solutions from leading providers. Experience live demos, discover innovative tools, and gain insights into how technology can transform your shared services operations.

Invest in Yourself and Your Team - Earn 18+ Credits!

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

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

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











HOT TAKE HUSTLE

Real-Time Collaboration for Shared Services Leaders!

Participate in a unique and interactive session designed to tackle the most pressing challenges facing shared services organizations today. This **dynamic activity** will get you out of your seat and actively engaged in **real-time problem-solving and benchmarking!**

We'll present a series of provocative statements related to shared services best practices, emerging trends, and industry hurdles. Based on your stance, you'll move to a designated area in the room. Once positioned, you'll engage in **collaborative discussions** with your group. Share your solutions, challenge conventional thinking, and gain valuable insights from your shared services colleagues.









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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

Workshop Registration 8:30 am

9:00 am Morning Workshops - pick 1

Workshop A

Close the Gaps in R2R Automation: Insights from New Research



Workshop B

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



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

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

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







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 D	Pay 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		

IDG₁

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

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

Nathanael L'Heureux, Chief Solutions Ambassador, Oversight

Hosted by: Voversight

IDG 5

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

Hosted by: O Thomson Reuters

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 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 3

Why Enterprises Are Going Beyond Al Agents to Al Employees?

Kenneth Upchurch, Advisor, Supervity



IDG 4

Transform Outcomes through Endto-End BPO Partnerships

Derek Aranda, Supply Chain Leader, Formerly Shell

IDG 7

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

Josh Heenehan. AP Solutions Consultant, Vic.Al

Hosted by: 🔘 VIC.NI

IDG 8

The Al Payback Clock: Fund Accuracy Upstream

Hosted by:
ADLIB







12:15 pm Networking Luncheon

Process Tracks - pick 1 🛂 1:15 pm

Data

The HR Analytics Toolkit: Engagement and Self-Service

Hosted by:



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

Process Tracks - pick 1 🔻 1:55 pm

Data

The Hidden Catalyst in GBS Transformation: Trustworthy, Empirical Data

States. ProHance

Anand Baradwaj, Executive Director,

Guidehouse

Hosted by: PROHANCE

Process Excellence

GBS Evolution: Optimizing Processes for

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

Networking Break 3:00 pm





How Do We Get the Data?: A Multifunction Assessment of Workforce Efficiency 3:30 pm

Dahlia Rigsby, Director, Finance Shared Services, West Fraser

Hosted by ScottMadden

The Collaboration Imperative: How Catalent's Global Process Owners Are Powering the Future of Finance 4:15 pm

Rachael Thorley, Director, GPO, R2R, Catalent Eric Joyner, Director, GPO, O2C, Catalent Florian Beiko, P2P Process Owner, Catalent

4:45 pm Al 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

Drinks Reception 5:15 pm

Main Day Three - Thursday, September 18, 2025

Breakfast and Networking 8:00 am

Panel: The New Metrics: Measure Strategic Value in Shared Services 9:10 am

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

Panel: The Modern Shared Services Leader: Influence, Innovation, Impact 9:40 am

> Moderator: Julie Schwendimann, Former Vice President of Global Shared Services Operations, Stanley Black & Decker Valguir Correa, Vice President, Corporate Finance, Baha Mar

EJ Santos, Head, Farmers Business Services, Farmers Insurance

Sheneg 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

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









12:00 pm Lunch

2:40 pm

Process Tracks - pick 1 🛂 1:00 pm

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,

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

Closing Recap and Final Thoughts

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











BEHIND THE SCENES SITE TOUR



Date: Monday, September 15, 2025

Time: 12:00 - 4:00 pm

Join us on a journey through a real service center, exploring shared services and outsourcing firsthand! Connect with peers, meet experts, and discover best practices for successful operations. Explore a cuttingedge facility showcasing seamless collaboration across departments. Learn more about the Site Tour that is available for just \$99 today!

Limited to 20 Guests - Hurry, spots are filling up fast!

Ontellus, the nation's largest record retrieval and claims intelligence provider, empowers insurance carriers, self-insured companies, thirdparty administrators and law firms to reduce costs, make informed decisions and accelerate claims resolution. Don't miss this opportunity to tour their Houston shared services operation located in the old Shell building just one mile from The Royal Sonesta.

The shared services operation comprises 100 employees in a Finance Shared Services operation. Explore the facility and discover how Ontellus leverages cutting-edge technology, including AI, RPA and ML to streamline tasks like invoice validation and client onboarding. Learn how they use client-facing and invoice-facing metrics to drive efficiency and satisfaction.

Site Tour Leder:



Manish Nariwal 000ontellüs

SAVE YOUR SPOT









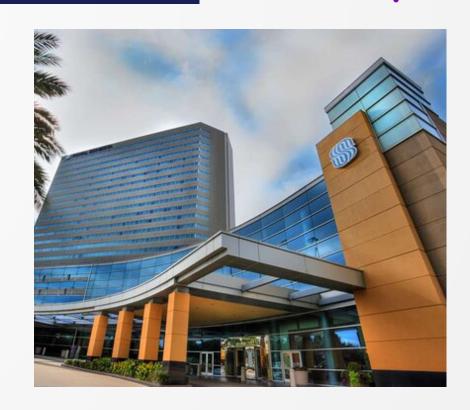
WHERE COMFORT MEETS CONVENIENCE

The Royal Sonesta Houston Galleria

2222 West Loop South Houston - TX 77027

Exclusive Discounted Rate: \$209

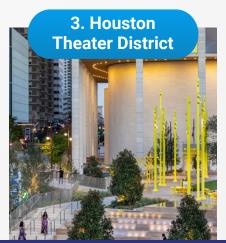
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Top 5 Things to Do in Houston!















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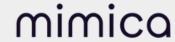






































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Thomas Christmann Director of Strategic Partnerships <u>Thomas.Christmann@ssonetwork.com</u>

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