



# MON | MARCH 16 – SSOWOMEN'S DAY, AGENTIC AI IN SHARED SERVICES BOOTCAMP, SITE TOURS

## CONCURRENT SESSIONS

### SSOWOMEN'S DAY

- 8:00 am **Registration**

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- 8:40 am **Chairwomen's Opening Remarks**  
**Liz Evans**, Principal, [PwC](#)  
**Deborah Kops**, (G6 Debate Moderator) - Founder, [Sourcing Change](#)

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- 8:50 am **INTERVIEW | The Road Not Yet Taken: Navigating Non-Linear Career Paths in Shared Services & GBS**  
**Jules Andrew**, Chief Business Services Officer, [Colgate-Palmolive](#)  
**Amy Wang**, Head of HR & Payroll Shared Services, [Mercedes Benz](#)

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- 9:20 am **PRESENTATION | From GBS Leaders to Enterprise Shapers – Building the Next Generation of Female Leaders in Enterprise Transformation**  
**Katya Reuk**, Principal, Organizational Strategy, [PwC](#)

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- 10:00 am **Short Transition Break into Interactive Discussion Groups**  
 Connect with amazing women in shared services! Join our interactive discussions, share your stories, and learn from others. It's a chance to build your network and gain fresh perspectives.

### SSOWOMEN'S DAY INTERACTIVE DISCUSSION GROUPS

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|--|--|--|---|
| 10:10 am <b>IDG #1</b><br><b>Second Acts: Reinventing Your Career in Mid to Senior Leadership</b><br><br><b>Amber Kempton</b> , SVP, Enterprise Business Operations (QTC), <a href="#">CDW</a> | <b>IDG #2</b><br><b>The Art of Self-Advocacy: Asking for Promotions, Pay, and Projects</b><br><br><b>Steph Ernsting</b> , Senior Director, HR Shared Services, <a href="#">Amcor</a> | <b>IDG #3</b><br><b>Career Exit Without Culture Exit: Staying Connected to Your Industry Community While Making Space for New Leadership</b><br><br><b>Jo Anne Dimitriou</b> , Former Executive Director, Service Center, <a href="#">US Air Force</a> | <b>IDG #4</b><br><b>Industry Surfing: How to Transfer Your Skills from Role to Role</b><br><br><b>Joya Carmichael</b> , Chief Administrative Officer, <a href="#">The Mechanical Licensing Collective</a> |
|--|--|--|---|

- 10:40 am **Short Transition Break into Interactive Discussion Groups**

### AGENTIC AI IN SHARED SERVICES BOOTCAMP

- 8:20 am **Registration**

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- 8:50 am **SSOW Welcome**

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- 8:55 am **Chairperson Remarks**  
**CK Taneja**, AI Strategist, [Northern Trust](#)

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- 9:00 am **PRESENTATION | State of the Industry for Agentic AI in GBS: SSON Research and Analytics Report Findings**  
**Naomi Secor**, Global Managing Director, [SSON Research & Analytics](#)

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- 9:15 am **PRESENTATION | Agentic AI in Action: Commercial Process Reengineering with AI to Drive Process Efficiency and Scale in GBS**  
**Amanda Sá**, Director, Digital Transformation & Innovation, [GBS Bosch Latin America](#)  
**Jonatas Santos**, Senior Manager, Digital Transformation & Innovation, [GBS Bosch Latin America](#)

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- 9:35 am **USE-CASE | Demystifying the Operating Model Shift: Enabling End-to-End Transformation with Agentic AI**  
**Marshall Tokheim**, VP, Process Orchestration & AI, [Ecolab](#)

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- 10:05 am **PANEL | Streamlining as a Value Creation Mechanism: A Framework for Operational Excellence**  
**Valquir Correa**, VP, Corporate Finance, [Baha Mar](#)  
**Brian O'Neil**, Senior Director, Shared Services North America, [TD SYNnex](#)



# MON | MARCH 16 – SSOWOMEN'S DAY, AGENTIC AI IN SHARED SERVICES BOOTCAMP, SITE TOURS

## CONCURRENT SESSIONS

### SSOWOMEN'S DAY

|          |   |   |   |  |
|----------|---|---|---|--|
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| 11:15 am | <b>Networking Break</b>   |   |   |  |
| 11:30 am | <b>PANEL   Lessons Learned: Senior Leaders Share Their Career Journeys and Advice</b><br><br>Moderator: <b>Rina Desai</b> , VP of Strategic Planning, <b>Panasonic</b><br><b>Sanjay Thirumalai</b> , Chief Global Delivery Officer, <b>STOUT</b><br><b>Vandana Khanna</b> , VP Digital Finance Transformation, <b>MetLife</b><br><b>Jazmin Alvarado</b> , VP, Shared Services, <b>Grupo Bimbo</b><br><b>Gillian Barton</b> , VP, Global Delivery Operations, <b>Otis Elevator Worldwide</b> |   |   |  |
| 12:00 pm | <b>PANEL   The Future of Leadership: Fostering Diversity, Equity, and Inclusion in Shared Services</b><br><br><b>Dr. Elizabeth Carter</b> , CEO, <b>AAPPEAL, LLC</b><br><b>Erin Vincent</b> , Vice President, Sonoco Services (GBS), <b>Sonoco</b><br><b>Mercedes Sullivan</b> , Executive Vice President, People, Culture & Communications, <b>McKinley</b>  |   |   |  |
| 12:30 pm | <b>PRESENTATION   Adaptive Leadership: Thriving Through Change and Uncertainty</b><br><br><b>Amy Bare</b> , Senior Director, Global Business Services Strategy & Global Delivery Network, <b>Kimberly-Clark</b><br><b>Kim -Marie Greenwood</b> , Sr. Director of Global Business Services, <b>Kimberly-Clark</b>  |   |   |  |
| 1:00 pm  | <b>KEYNOTE   Leading at the Top: Insights From a C-Suite Executive</b><br><br><b>Maria Janssen</b> , Chief Transformation Officer, <b>Allianz Services</b>  |   |   |  |
| 1:30 pm  | <b>Lunch for SSOWomen / Takeaway Lunch for Site Tour Participants</b>   |   |   |  |

### AGENTIC AI IN SHARED SERVICES BOOTCAMP

|          |  |
|----------|--|
| 10:35 am | <b>USE-CASE   Driving Measurable Value Through OE Agents and Digital Enablement</b><br><br><b>Jesús Villalobos</b> , Operational Excellence Lead GBS Americas, <b>Kerry</b><br><b>Hector Alderete</b> , Head of Global Business Services, Americas, <b>Kerry</b>   |
| 11:05 am | <b>Networking Break</b>  |
| 11:35 am | <b>PANEL   The Conundrum of Build or Buy</b><br><br><b>April Russo</b> , VP, Compliance & Transformation, <b>USA TODAY Co.</b><br><b>Aruna Katakamsetti</b> , Senior Director, Global Business Services, <b>Astellas Pharma</b>  |
| 12:05 pm | <b>USE-CASE   Orchestrating the Future of Finance: Achieving Seamless End-to-End Agility with Agentic AI"</b><br><br><b>Linford Dailey</b> , Global Digitalization & Automation Leader, <b>Bosch</b>   |
| 12:35 pm | <b>USE-CASE   Empowered Teams, Intelligent Automation Through Agentic AI: Inside Mercado Libre's Finance Reinvention</b><br><br><b>Javier Bravo</b> , FinOps Senior Manager, PTP, <b>Mercado Libre</b><br><b>Francisco Rico</b> , Senior Manager, <b>Mercado Libre</b><br><b>Gustavo Rissola</b> , Senior Director, <b>Mercado Libre</b> |

# MON | MARCH 16 – SSOWOMEN'S DAY, AGENTIC AI IN SHARED SERVICES BOOTCAMP, SITE TOUR

## SITE TOUR

- 12:45 pm **Site Tour Registration Opens**
- 2:30 pm **Discover the Siemens GBS Organization Evolution**
- 5:10 pm **Networking Reception for SSOWomen's Day & Site Tour**



## AGENTIC AI IN SHARED SERVICES BOOTCAMP

- 1:05 pm **Networking Lunch**
- 2:05 pm **Short Transition to Interactive Discussion Groups**

### INTERACTIVE DISCUSSION GROUPS

- |         |   |  |
|---------|---|--|
| 2:10 pm | <b>IDG #1</b><br><b>Reimagining Procurement: Virtual Assistants in Action</b><br><b>Claudia Armenta Renteria</b> , Global Process Owner, Procure-to-Pay, <b>CEMEX</b> | <b>IDG #2</b><br><b>Data and Governance Foundations: Creating Autonomous, AI-Driven Shared Services</b><br><b>Greg Goelkel</b> , Head of Presales, <b>ORO Labs</b> |
|---------|---|--|

### Transition to Second Interactive Discussion Group

- |         |   |  |
|---------|---|--|
| 2:40 pm | <b>IDG #1</b><br><b>Reimagining Procurement: Virtual Assistants in Action</b><br><b>Claudia Armenta Renteria</b> , Global Process Owner, Procure-to-Pay, <b>CEMEX</b> | <b>IDG #2</b><br><b>Data and Governance Foundations: Creating Autonomous, AI-Driven Shared Services</b><br><b>Greg Goelkel</b> , Head of Presales, <b>ORO Labs</b> |
|---------|---|--|

- 3:10 pm **Networking Break**
- 3:40 pm **DEMOS | Use Case Blitzes**  
**Brad Meador**, Director, Digital Transformation, **USA TODAY Co.**  
**Pranav Mulgund**, CEO & Co-Founder, **Fragment Data Technologies**
- 4:10 pm **PANEL | Change Management Essentials for Seamless Adoption**  
**Christof Fahr**, Global Lead, Global Business Services Productivity and Value Creation, **Siemens**  
**Robert Phillips**, VP Business Transformation, **WELL Health Technologies**

- 4:40 pm **PANEL | Accountability in Action: Agentic AI Governance For Your Business**
- 5:10 pm **Networking Reception**

# TUES | MARCH 17 – WORKSHOPS, MAIN DAY ONE, SSOW GLOW PARTY

## WORKSHOPS

7:30 am **Breakfast and Registration**

|          | SHARED SERVICES FUNDAMENTALS   | WORKFORCE MANAGEMENT  | PROCESS EXCELLENCE   | FINANCE TRANSFORMATION  | DIGITAL TRANSFORMATION IN SHARED SERVICES   | PROBLEM SOLVING CLINICS  |
|----------|--|---|--|---|---|--|
| 8:30 am  | <p><b>WORKSHOP A: 101: Designing Shared Services that Last: Getting the Fundamentals Right from Day 1</b></p> <p>Jonathan Luk, Partner, <a href="#">ScottMadden</a><br/>                     Patricia Ferris, Partner, <a href="#">ScottMadden</a><br/>                     Trey Robinson, Partner and Practice Area Leader, <a href="#">ScottMadden</a><br/>                     Hosted by: <a href="#">ScottMadden</a></p> | <p><b>WORKSHOP B: Building Shared Services Versatility: Balancing Depth and Breadth in a Fast-Paced Environment</b></p> <p>Hosted by <a href="#">ProHance</a></p>   | <p><b>WORKSHOP C: Scaling Responsible AI in Shared Services: Building Trust, Controls &amp; Guardrails</b></p> <p>Fuad Abdelhadi, Partner, <a href="#">PwC</a><br/>                     Hosted by <a href="#">PwC</a></p>  | <p><b>WORKSHOP D: Hybrid Intelligence: Scaling GenAI with Trust and Structure to Unlock Business Value</b></p> <p>Jonathan Knisley, Global Process AI Lead, <a href="#">ABBYY</a><br/>                     Hosted by: <a href="#">ABBYY</a></p>   | <p><b>WORKSHOP E: Accelerating Digital &amp; AI Enabled Transformation</b></p> <p>Dan French, CEO, <a href="#">Consider Solutions</a><br/>                     Steve Fox, Process Excellence Leader, <a href="#">Consider Solutions</a></p> | <p><b>WORKSHOP F: The Efficiency Mirage: What Tools Won't Fix in Record-to-Report Automation</b></p> <p>Aaron Veach, Executive Director, Finance Transformation, <a href="#">Redwood Software</a><br/>                     Marek Sobczyk, Global Process Owner in Record-to-Report, <a href="#">Siemens</a><br/>                     Barbara Hodge, Global Digital Content, <a href="#">SSON</a><br/>                     Hosted by: <a href="#">Redwood</a></p> |
| 10:00 am | <b>Morning Break</b>   |   |  |   |   |  |
| 10:30 am | <p><b>WORKSHOP G: 501: Unlocking the Next Phase of Shared Services Maturity</b></p> <p>Henry Bell, Partner, <a href="#">ScottMadden</a><br/>                     Laura Campbell, Partner, <a href="#">ScottMadden</a><br/>                     George Penton, Partner, <a href="#">ScottMadden</a><br/>                     Hosted by: <a href="#">ScottMadden</a></p>   | <p><b>WORKSHOP H: Operations Transformation in the Age of AI</b></p> <p>Chas Moore, Executive Partner Transformation, <a href="#">Chazey Partners</a><br/>                     Greg Asher, Lumi AI Developer, <a href="#">Chazey Partners</a></p> | <p><b>WORKSHOP I: Transforming the Back Office Into a Profit Optimizer: A Practical Blueprint for Unlocking Value With ERP Enhancements, RPA, and AI</b></p> <p>Jivka Batchvarova, Managing Principal, <a href="#">Baker Tilly</a><br/>                     Sam Dastoor, Principal, <a href="#">Baker Tilly</a><br/>                     Hosted by <a href="#">Baker Tilly</a></p> | <p><b>WORKSHOP J: Stuck in Pilots? Practical Approaches to Shift Agentic AI Aspirations into Business Outcomes</b></p> <p>Khalid Siddiqui, Global Offering Leader - Finance Operations / Business Ops, <a href="#">IBM Consulting</a>, <a href="#">IBM</a><br/>                     Anish Jain, OTC Offering Lead, <a href="#">IBM Consulting</a>, <a href="#">IBM</a><br/>                     Hosted by <a href="#">IBM</a></p> | <p><b>WORKSHOP K: From Automation to Autonomy: How GBS Leaders are Accelerating Business Value with Agentic AI</b></p> <p>Hosted by <a href="#">Capgemini</a></p>   | <p><b>WORKSHOP L: Blueprint for De-Risking GCC Setup, Build &amp; Expand: Orchestrating Your First of Next Center with AI and Experts</b></p> <p>Pankaj Sharma, Head of Operations, <a href="#">Aokah</a><br/>                     Atul Vashistha, Chair and CEO, <a href="#">Aokah</a><br/>                     Steve Rudderham, Chair of the Advisory Board, <a href="#">Aokah</a><br/>                     Hosted by: <a href="#">Aokah</a></p>               |

# TUES | MARCH 17 – WORKSHOPS, MAIN DAY ONE, SSOW GLOW PARTY

12:00 pm **Networking Luncheon and Grand Opening of Innovation Hub**

1:00 pm **SSOW Opening Remarks**

**Brad DeMent**, Partner, [ScottMadden](#)  
**Heather King**, Managing Director, [SSON](#)

1:30 pm **Transformative Times: GBS Organizations Between New Requirements and the Race for Digitalization**

**Eckard Eberle**, CEO, Global Business Services, [Siemens](#)

2:00 pm **PANEL | Beyond Boundaries: Broadening the GBS Value Proposition to Front and Middle Office**

Moderator: **Maria Saggese**, EY Global and EMEA Global Business Services Solution Leader, [EY](#)  
**Shane Abeyratne**, Senior Vice President and Head, GBS, [Cardinal Health](#)  
**Kyle Arnold**, Chief Global Services Officer, [Bon Secours Mercy Health](#)  
**Cindy Gallagher**, Chief Accounting Officer, [USA TODAY Co.](#)  
 Hosted by [EY](#)

2:30 pm **Finding the Value: How a GBS Strategy Set the Path for Global Scale and Digital Evolution**

**Michael Zill**, Head of Global Business Services, [Vantiv](#)  
 Hosted by [ScottMadden](#)

3:00 pm **Networking Break**

## CONCURRENT BREAKOUT SESSIONS

|         | BIG IDEA STAGE   | DIGITAL TRANSFORMATION TRACK  | FINANCE TRANSFORMATION PROGRAM  |
|---------|--|---|---|
| 3:40 pm | <p><b>People First, Purpose Always: The Human Side of Cencora's GBS Transformation</b></p> <p><b>Kim Skanson</b>, SVP, Global Business Services, <a href="#">Cencora</a></p> | <p><b>PRESENTATION   Meaningful AI Deployment: How to Select and Scale the Right Use Cases in Shared Services</b></p> <p><b>Raja Chaudhury</b>, Head GBS Strategy, Service Management &amp; Systems, <a href="#">Dexcom</a><br/> <b>Brian Bachofner</b>, SVP, Marketing, <a href="#">Neuron7.ai</a><br/>                     Hosted by <a href="#">Neuron7.ai</a></p> | <p><b>PRESENTATION   Finance Transformation for the Future of Shared Services</b></p> <p><b>Andrew Fuhrmann</b>, VP of Customer Success, <a href="#">Basware</a><br/> <b>Usha Gollapudi</b>, Director-ONE NOV Shared Services-Corporate, <a href="#">NOV</a><br/>                     Hosted by <a href="#">Basware</a></p> |

4:10 pm **Transition**

- Welcome
- Speakers
- Why Attend?
- Agentic AI Bootcamp
- SSOWomen's Day
- Future of GBS Boardroom
- Site Tours
- Impact Awards
- SSOW Glow Party
- Agenda
- Book Online



# TUES | MARCH 17 – WORKSHOPS, MAIN DAY ONE, SSOW GLOW PARTY

## CONCURRENT BREAKOUT SESSIONS

|         | BIG IDEA STAGE   | DIGITAL TRANSFORMATION TRACK   | FINANCE TRANSFORMATION PROGRAM   |
|---------|--|--|--|
| 4:15 pm | <p><b>Redefining the Global Business Services Mandate: Orchestrating the Enterprise of the Future</b></p> <p>Hosted by <a href="#">Cognizant</a></p> | <p><b>FIRESIDE CHAT   Digital Transformation Without Disruption: Balancing Today's Service with Tomorrow's Vision</b></p> <p><b>Tommy Wehry</b>, Organizational Effectiveness &amp; Change Lead   Finance and Shared Services Transformation, <a href="#">The Estée Lauder Companies</a></p> <p><b>Mohan Thadani</b>, Senior Director, Business Center Support, <a href="#">Liberty Utilities</a></p> <p>Hosted by <a href="#">HCLTech</a></p> | <p><b>The Unstoppable Journey: A Phased Approach to Finance Transformation</b></p> <p><b>Dorcal Jiminez</b>, Senior Director, Compliance &amp; Operational Audit, <a href="#">LAZ Parking</a></p> <p><b>James Tilk</b>, Director, Solutions Strategy &amp; Marketing, <a href="#">Blackline</a></p> <p>Hosted by <a href="#">Blackline</a></p> |

4:45 pm **Transition**

4:50 pm **How United Rentals Harnessed Agentic AI to Redefine Order-to-Cash Performance**  
Hosted by [Sidetrade](#)

5:20 pm **Wine Down Networking Break**

5:50 pm **Break for Dinner and Dressing**

8:30 pm **SSOW Glow Party - Lucky 30!**





# WED | MARCH 18 – MAIN DAY TWO & SSON IMPACT AWARDS GALA

7:30 am **Breakfast and Registration**

8:30 am **SSOW Opening Remarks**

8:40 am **Shared Services & GBS State of the Industry Presented by SSON Research & Analytics**

Tom Bangemann, Head of Data Development & Research, [SSON Research & Analytics](#)

9:00 am **GBS Reimagined – Powering the Connected Enterprise**

Hosted by [Capgemini](#)

9:30 am **Frontline by Design: How Customer Experience is Re-Wiring GBS**

Himadri Sarkar, Chief Solutions Officer, [Teleperformance](#)

Hosted by [Teleperformance](#)

10:00 am **Transition into Breakout Programs**

## CONCURRENT BREAKOUT SESSIONS

### BIG IDEA STAGE

10:05 am **PANEL | GBS as a Growth Engine – From Cost Center to Growth Center**

Moderator: **Hariprasad BK**, VP & Business Head – Digital Business Services, [Infosys](#)

**Srini Cherukumilli**, Corporate VP Shared Services, [CRH – Oldcastle APG](#)

**Juan Salazar**, CFO, Head of Strategy & Performance, Business Services, [Amrize](#)

**Jules Andrew**, Chief Business Services Officer, [Colgate-Palmolive](#)

Hosted by [Infosys BPM](#)

### FUTURE OF BUSINESS SERVICES BOARDROOM (INVITE ONLY)

**Digital GBS: What is the Ecosystem to Create a Future-Proof GBS Organization?**

**Dorian Redding**, EY Americas Consulting Solution Leader, GBS, [EY](#)

**Cindy Gallagher**, Chief Accounting Officer, [USA TODAY Co.](#)

10:35 am **Networking Break and Demo Drive**

Welcome

Speakers

Why Attend?

Agentic AI Bootcamp

SSOWomen's Day

Future of GBS Boardroom

Site Tours

Impact Awards

SSOW Glow Party

Agenda

Book Online





# WED | MARCH 18 – MAIN DAY TWO & SSON IMPACT AWARDS GALA

11:20 am

## BREAK INTO IDGS – 2 IDGS

11:20 – 12:00pm – Round 1 | 12:00 pm – 12:05 – Break to Change Topics | 12:05 – 12:45 – Round 2

## FUTURE OF BUSINESS SERVICES (INVITE ONLY):

11:20 am - 12:20 pm

### GBS Talent Evolution - How are the Skills Needed to Lead a GBS Organization Today Different than Skills Needed in 2030?

**Graeme Hastings**, SVP, GBS Strategy & Transformation & Mexico Capability Center Leader, **Warner Bros. Discovery**

**Sebastian Arce**, EY Consulting Partner, Consumer Products & Retail, **EY**

**Tanuja Singi**, VP, Head of Global Business Solutions, **McCormick**

|   |   |  |  |
|---|---|--|--|
| <p><b>IDG 1: Location Strategy in the AI Era: Do You Build, Buy, or Automate?</b></p> <p><b>Chris Costa</b>, Head of Finance Transformation, <b>Chewy</b></p>   | <p><b>IDG 2: How Do You Manage Change Fatigue in HR Transformation Initiatives?</b></p> <p><b>Lourens Van Zyl</b>, Business Director, <b>Transparent</b></p> <p>Hosted by <b>Transparent</b></p>  | <p><b>IDG 3: Measuring Innovation in SSOs: What Metrics Actually Matter?</b></p> <p><b>Michael Cloherty</b>, Head of Sales, <b>Trustpair</b></p>   | <p><b>IDG 4: Agentic GBS: Breaking Down Barriers to Rapid Adoption</b></p> <p><b>Uli Erxleben</b>, Founder, CEO, <b>Hypatos</b></p> <p><b>Sally Fletcher</b>, Head of Thought Leadership &amp; Community, <b>Hypatos</b></p> |
| <p><b>IDG 5: Beyond the Back Office: Redefining GBS/SSC Value through AI-Driven Cost Optimization and Customer Centricity</b></p> <p><b>Zach Hemmant-Low</b>, Chief Sales Officer, <b>Rossum</b></p> <p>Hosted by <b>Rossum</b></p> | <p><b>IDG 6: People, Process, and Technology: How are You Mastering the Triangle of Transformation?</b></p> <p><b>Lourens Van Zyl</b>, Business Director, <b>Transparent</b></p> <p>Hosted by <b>Transparent</b></p>                        | <p><b>IDG 7: How Do We Prove ROI and Explain the Realities of AI?</b></p> <p><b>Michael Cloherty</b>, Head of Sales, <b>Trustpair</b></p>  | <p><b>IDG 8: Governance in the Age of AI: Structure, Risk, and Strategy</b></p> <p><b>Tina Robinson-Adamski</b>, VP, GBS, <b>Domino's</b></p>  |
| <p><b>IDG 9: What's the GBS Skill Stack of the Future?</b></p>  | <p><b>IDG 10: Beyond Billing: Driving Cash Flow Through Improved Customer Communications</b></p> <p><b>Sarah-Jayne Martin</b>, Senior Director, Global Financial Automation Solutions, <b>Quadient</b></p> <p>Hosted by <b>Quadient</b></p> | <p><b>IDG 11: Efficiency Meets Security: Automating Vendor Bank Account Validation in Shared Services</b></p> <p><b>Michael Cloherty</b>, Head of Sales, <b>Trustpair</b></p>                                      | <p><b>IDG 12: From Fragmented to Focused: Centralizing Payroll &amp; HR Operations for Impact</b></p> <p><b>Nathan Bland</b>, Head of GBS, <b>Pfizer</b></p>   |
| <p><b>IDG 13: From Proof of Concept to Production: How Shared Services Can Operationalize AI Fast</b></p> <p><b>Mark Brousseau</b>, President, <b>Brousseau &amp; Associates</b></p> <p>Hosted by <b>Itemize</b></p>                | <p><b>IDG 14: Less Pain, More Gain: Altus Intelligence Elevates AR and Collections Service Delivery</b></p> <p><b>AJ Rose</b>, Client Success Manager, <b>Altus</b></p>   | <p><b>IDG 15: Governance as Optionality: Is Your Framework an Engine or a Brake?</b></p> <p><b>Johnnie Moore</b>, CEO &amp; Founder, <b>JR Moore Group</b></p>   | <p><b>IDG 16: Boosting Employee Engagement: Practical Strategies for a Thriving Shared Service Center</b></p> <p><b>Robert Turck</b>, VP, Global Financial Shared Services, <b>IQVIA</b></p>                                 |
| <p><b>IDG 17: Agentic AI and GBS 2030</b></p> <p><b>Diane Ma</b>, US Global Business Services Leader, <b>Deloitte Consulting LLP</b></p> <p>Hosted by <b>Deloitte</b></p>   | <p><b>IDG 18: Simplifying at Scale: The Reality of Downsizing Your ERPs</b></p> <p><b>Lisa Cox</b>, Senior Director, Business Transformation, Finance SS, <b>Xylem</b></p>  | <p><b>IDG 19: Scaling Shared Services with AI: Standardization, Efficiency &amp; Control for AP Processes</b></p> <p><b>Derrick Leck</b>, Head of Value and Solutions Consulting, North America, <b>Medius</b></p> | <p><b>IDG 20: From Offshore to Digital Shore: Honest Lessons From Teams Who've Done It</b></p> <p><b>Jamie Thomas</b>, CEO &amp; Co-Founder, <b>Simplify IA</b></p> <p>Hosted by <b>Simplify IA</b></p>                      |

Welcome  
Speakers  
Attend?  
Why  
Agentic AI  
Bootcamp  
SSOWomen's  
Day  
Future of GBS  
Boardroom  
Site  
Tours  
Impact  
Awards  
SSOW  
Glow  
Party  
Agenda  
Book  
Online





# WED | MARCH 18 – MAIN DAY TWO & SSON IMPACT AWARDS GALA

12:45 pm **Lunch**

## CONCURRENT SESSIONS

1:50 pm

### HUMAN RESOURCES SHARED SERVICES PROGRAM

Chairwoman: Steph Ernsting, Senior Director of North America HR Shared Services, **Amcor**

#### From Right and On Time to Transformative: HRSS's Evolving Strategic Role

**Julie Fernandez**, Global HR Advisory Lead, **herronpalmer**

**Amanda Kassler**, Payroll Shared Services Manager, **Otsuka America**

**Monica Miller**, SVP Payroll & Workforce Strategy, **Compass**

Hosted by **herronpalmer**

### PROCESS EXCELLENCE PROGRAM

#### Inside McKesson's Shared Services Transformation: How Process Intelligence is Improving Accounts Payable and Beyond

**Brandy Hulsey**, VP, Accounts Payable & Reverse Logistics, **McKesson**

**Tuhin Chakraborty**, Co-Founder & CEO, **Mimica**

Hosted by **Mimica**

### FINANCE TRANSFORMATION PROGRAM

#### Agentic AI Use Cases and Agent-Building for End-to-End Order-to-Cash Operational Efficiency

**Veena Gundavelli**, CEO & Founder, **Emagia**

Hosted by **Emagia**

### SHARED SERVICES FUNDAMENTALS PROGRAM

#### FIRESIDE CHAT | Defining Success from the Start: Building a Business Case Beyond Cost Savings

**John Haynes**, Head of Cash Cycle Management – ABS, **AON**

**Teanne Bridgewater**, AR Commercial Risk Capability Center Leader, **AON**

**Wolfgang Satori**, VP and Head of GBS Opportunity to Cash, Americas, **Siemens**

### DIGITAL TRANSFORMATION PROGRAM

#### High-Volume to High-Value: The Agentic AI Blueprint for GBS Process Transformation

**Urvish Khandwalla**, Sr. Director, Product Management, GBS Portfolio & AI, **Iron Mountain**

**Victoria Roehrich**, Sr. Director GBS Strategy and Transformation, **Iron Mountain**

Hosted by **Iron Mountain**

### PROCUREMENT/SUPPLY CHAIN MANAGEMENT PROGRAM

#### Build a Unified View of Supply Chain Data for Stronger Business Outcomes

Hosted by **PRGX**

### SCOPE EXPANSION PROGRAM

#### PANEL | The Great Scope Expansion— GBS as a Home for Sales, Engineering, and More!

**Tom McFarland**, SVP, Head of Customer Success Shared Services, **LHH**

**Joaquin Garcia**, HR Head LATAM - HR Shared Service Center Head Americas, **Flix**

### FUTURE OF BUSINESS SERVICES BOARDROOM (INVITE ONLY)

1:50-2:35pm

#### Reinvention or Irrelevance: Is the GBS Operating Model as We Know It at Risk of Extinction?

**Steve Rudderham**, Former, Head, Global Business Services, **Carrier**

**Nick Cernese**, EY Life Sciences Finance Transformation Leader, **EY**

Hosted by **EY**

2:20 pm **Transition Break**





# WED | MARCH 18 – MAIN DAY TWO & SSON IMPACT AWARDS GALA

## CONCURRENT SESSIONS

2:25 pm

| HUMAN RESOURCES SHARED SERVICES PROGRAM  | PROCESS EXCELLENCE PROGRAM   | FINANCE TRANSFORMATION PROGRAM   | SHARED SERVICES FUNDAMENTALS PROGRAM   |
|--|--|--|--|
| <p><b>PANEL   Rethinking Case Management for the Deskless Workforce</b></p> <p><b>Stacy Hodge</b>, Head of NA HR Ops, Shared Services &amp; Payroll, <a href="#">HelloFresh</a></p>  | <p><b>PANEL   Reengineering Processes, People, and Performance in the Age of New Technology</b></p> <p><b>Jakub Wojdat</b>, Senior Director, Global Head of Finance Shared Services, <a href="#">TE Connectivity</a></p> <p><b>Kirti Talwar</b>, Vice President, Accounting Operations, <a href="#">Palo Alto Networks</a></p> <p><b>Brian Chan</b>, Senior Finance Leader, <a href="#">Pet Valu</a></p> <p>Moderator: <b>Russ Malz</b>, Chief Revenue Officer, <a href="#">KnowledgeLake</a></p> <p>Hosted by <a href="#">KnowledgeLake</a></p> | <p><b>Beyond Receipts and Reimbursements— Reimagine Travel &amp; Expense in the Modern SSO</b></p> <p><b>Tony DeNardo</b>, Principal Solution Advisor, <a href="#">SAP Concur</a></p> <p>Hosted by <a href="#">SAP</a></p> | <p><b>Data-First Foundations: Building a Unified, Actionable Data Strategy</b></p> <p>Hosted by <a href="#">ProHance</a></p>   |
| DIGITAL TRANSFORMATION PROGRAM   | PROCUREMENT/SUPPLY CHAIN MANAGEMENT PROGRAM  | SCOPE EXPANSION PROGRAM  | FUTURE OF BUSINESS SERVICES BOARDROOM (INVITE ONLY)  |
| <p><b>AI Employees at the Core of Digital Transformation: Moving from Bots to Enterprise Workforces</b></p> <p><b>Siva Moduga</b>, Co-Founder &amp; CEO, <a href="#">Supervity</a></p> <p>Hosted by: <a href="#">Supervity</a></p> | <p><b>Creating Better Insights on Category Savings Through Technology</b></p> <p>Hosted By <a href="#">TCS</a></p>   | <p><b>Coming Soon!</b></p>   | <p>2:35 pm - 3:20 pm</p> <p><b>What is GBS Value Today? A Discussion to Detail Where the GBSO is Delivering Real-World Value to the Business</b></p> <p><b>Samir Singh</b>, SVP, Head of GBS, <a href="#">Brinks</a></p> <p>Hosted by <a href="#">EY</a></p> |

2:55 pm

**Transition Break**

Welcome

Speakers

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Agentic AI Bootcamp

SSOWomen's Day

Future of GBS Boardroom

Site Tours

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Agenda

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## CONCURRENT SESSIONS

3:00 pm

| HUMAN RESOURCES SHARED SERVICES PROGRAM  | PROCESS EXCELLENCE PROGRAM   | FINANCE TRANSFORMATION PROGRAM   | SHARED SERVICES FUNDAMENTALS PROGRAM  |
|--|--|--|---|
| <p><b>“AI Colleagues” That Take Action in Shared Services - What They Are, How They Work, What it Takes to Deploy Them</b></p> <p>Hosted by <a href="#">Leena AI</a></p> | <p><b>Harmonize to Optimize: Use Process Intelligence to Build Scalable, AI-Ready Operations</b></p> <p><b>Patrick Thompson</b>, SVP, Global Customer Transformation, <a href="#">Celonis</a></p> <p><b>Durga Yeluri</b>, Director, Performance &amp; Profitability Optimization (P2O) CoE, <a href="#">Pfizer</a></p> <p>Hosted by: <a href="#">Celonis</a></p> | <p><b>Reimagining Controls: Turning Financial Risk into a Source of Strategic Advantage</b></p> <p><b>Nathanael L'Heureux</b>, Chief Solutions Ambassador, <a href="#">Oversight</a></p> <p>Hosted by: <a href="#">Oversight</a></p>               | <p><b>Transform Chaos into Clarity with Process Mapping &amp; Automation</b></p> <p><b>Debbie Lougheed</b>, Sr. Director Shared Accounting Services, <a href="#">Diocese of Orlando</a></p>   |
| DIGITAL TRANSFORMATION PROGRAM   | PROCUREMENT/SUPPLY CHAIN MANAGEMENT PROGRAM  | SCOPE EXPANSION PROGRAM  | FUTURE OF BUSINESS SERVICES BOARDROOM (INVITE ONLY)   |
| <p><b>From Requests to Results: Building Common Governance Across Business, IT, and Info Security</b></p> <p>Hosted by <a href="#">KPMG</a></p>                          | <p><b>Break Down Silos in P2P: Align Sourcing &amp; Payables into One Value Stream</b></p> <p><b>Aranzazu Lopez</b>, Managing Director, <a href="#">Lufhansa Group Business Services</a></p>   | <p><b>CASE STUDY   A Model for Innovation: Discover Value Expansion Through McCormick's Technical Shared Services</b></p> <p><b>Milena Biardzka</b>, Global Delivery Lead, Technology Shared Services, <a href="#">McCormick &amp; Company</a></p> | <p>2:35 pm - 3:20 pm</p> <p><b>What is GBS Value Today? A Discussion to Detail Where the GBSO is Delivering Real-World Value to the Business</b></p> <p><b>Samir Singh</b>, SVP, Head of GBS, <a href="#">Brinks</a></p> <p><b>Kyle Perry</b>, EY Consulting Executive Director, Health, <a href="#">EY</a></p> <p><b>Jodi Dudley</b>, Head, Global Business Services, <a href="#">MassMutual</a></p> <p>Hosted by <a href="#">EY</a></p> |

Welcome

Speakers

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# WED | MARCH 18 – MAIN DAY TWO & SSON IMPACT AWARDS GALA

3:30 pm **Networking Break and Demo Drive**

4:05 pm **PANEL | Orchestrating Transformation: Human-AI Workflows that Scale Across Towers**

Hosted by [Wipro](#)

4:35 pm **PANEL | Back (Office) to the Future: GBS and the Next Wave of Operating Model Transformation**

Hosted by [Deloitte](#)

5:05 pm **Reinvention with Agentic AI – How Ecolab and Accenture Are Creating Business Value**

**Troy Quick**, Managing Director, [Accenture](#)

**AJ Wijesinghe**, SVP, Global Business Services+, [Ecolab](#)

Hosted by [Accenture](#)

5:35 pm **Benchmark Against SSON's Top 20 Most Admired GBS Organizations**

**Barbara Hodge**, Global Editor, [SSON Analytics](#)

5:55 pm **SSOW Innovation Hub Reception**

7:00 pm **2026 SSON North American Impact Awards Gala**

4:00pm-5:00pm

**How to Be Data Driven in the Chicken and the Egg Scenario?**

**Steve Gordon**, Associate Vice President, Global Business Solutions, [Merck](#)

**Greg Battaglia**, EY Consulting Partner, Media & Entertainment, [EY](#)

5:00pm -6:00pm

**Outsourcing in the Age of the Agents**

**Nitee Gupta**, EY Consulting Executive Director, Life Sciences, [EY](#)



Welcome

Speakers

Why Attend?

Agentic AI Bootcamp

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Site Tours

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SSOW Glow Party

Agenda

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# THURS | MARCH 19 – MAIN DAY THREE & SSOW KEYNOTE

8:15 am **Breakfast in the Innovation Hub**

8:45 am **Chairman's Remarks**

8:55 am **Milestone Reflections: 30 Years of SSOW, 30 Years of Shared Services Growth**

9:25 am **Transition to Breakout Programs**

## CONCURRENT BREAKOUT SESSIONS

|          | BIG IDEA STAGE  | HUMAN RESOURCES SHARED SERVICES PROGRAM  | FINANCE TRANSFORMATION PROGRAM  |
|----------|---|--|---|
| 9:30 am  | <p><b>The G6 Debate: The Outsourcing Model in 2030: In the AI Age, Does BPO Fit?</b></p> <p>Moderator: <b>Deborah Kops</b>, Founder, <a href="#">Sourcing Change</a></p> <p><b>Shiva Jayaraman</b>, Senior Vice President &amp; Business Head – Consumer Industries, and Brazil, <a href="#">Wipro Limited</a></p> <p><b>Yogi Goyal</b>, Global Managing Partner, Business Operations, <a href="#">IBM Consulting</a></p> | <p><b>CASE STUDY   Transition, Transformation &amp; Partnership: Payroll's New Role in Finance Shared Services Center</b></p> <p><b>Jacob Davis</b>, Director Financial Shared Services, <a href="#">Textron</a></p>       | <p><b>FIRESIDE CHAT   Reimagining DSO—Using Outcome-Based Triggers to Accelerate Payment Cycles</b></p> <p><b>Donny Heaton</b>, Senior Director, Global Order-to-Cash, <a href="#">Boston Scientific</a></p> <p><b>Kristin Schooley</b>, Director, Order-to-Cash, <a href="#">Learning Care Group</a></p> |
| 10:00 am |   | <p><b>Leading Through Uncertainty: How Siemens Navigated a Global-to-Regional Transformation</b></p> <p><b>Michelle Irwin</b>, Head of Media, Marketing, Communications, Culture and Training, <a href="#">Siemens</a></p> | <p><b>Project LEAP: Accelerating Finance Transformation at Scale</b></p> <p><b>Gabe Lantos</b>, Sr. Director, Project LEAP Finance Transformation Lead, <a href="#">Bristol Myers Squibb</a></p>  |

10:30 am **KEYNOTE | The Power of One**

**Erin Brockovich**, Advocate, Author & President, [Brockovich Research & Consulting](#)

11:15 am **Brunch and Networking Break**

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Speakers

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Impact Awards

SSOW Glow Party

Agenda

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| CONCURRENT SESSIONS |  |   |  |   |   |   |
|---------------------|--|---|--|---|---|---|
| 12:15 pm            | <b>HUMAN RESOURCES SHARED SERVICES PROGRAM</b><br><br><b>Fix the Foundation: Tackle Your Fragmented HR Systems Before You Implement AI</b><br><br>Stacy Marshall, Director, HR Shared Service & Systems, People Analytics and HR Programs, <a href="#">Lifemark Health Group</a> | <b>SHARED SERVICES FUNDAMENTALS PROGRAM</b><br><br><b>Identify Benchmark Frameworks to Define What “Good” Looks Like in Year One</b><br><br>Karen Terrill, VP, Financial Shared Services, <a href="#">TEGNA</a> | <b>PROCESS EXCELLENCE PROGRAM</b><br><br><b>The Continuous Improvement Blueprint: Real-Time Data as Your Competitive Edge</b><br><br>  | <b>PROCUREMENT/ SUPPLY CHAIN MANAGEMENT PROGRAM</b><br><br><b>CASE STUDY   Partner with Procurement to Optimize Cost through Strategic Vendor Indexing</b><br><br>Anotte Francois, Sr. Director, Procure-to-Pay, <a href="#">TheKey</a> | <b>DIGITAL TRANSFORMATION PROGRAM</b><br><br><b>Cracking the CoE Code: Investment, Design, and Lessons Learned in AI/ Automation</b><br><br>Jeff Edwards, SVP Operations, <a href="#">Ontellus</a><br><br>David Borges, VP Operations, <a href="#">Ontellus</a><br><br>Mason Ross, SVP Operations, <a href="#">Ontellus</a> | <b>SCOPE EXPANSION PROGRAM</b><br><br><b>CASE STUDY   Early Steps Toward an Expanded GBS Footprint: From Vision to Validation</b><br><br>Claudia Petrocchi, VP of Employee Experience and Services, <a href="#">CSL Behring</a>                                     |
| 12:45 pm            | <b>Transition Break</b>  |   |  |   |   |   |
| 12:50 pm            | <b>PANEL   Co-Creating the Future Workforce: How HR, Tech &amp; Operations Build Skills for What’s Next</b><br><br>Beth Cord, Vice President-BEST HR Shared Services, <a href="#">L’Oreal</a><br><br>Eric Manten, Director of People Services, <a href="#">AAR</a>               | <b>AI Kickstart— Practical Strategies for Emerging SSOs</b><br><br>Nikki Rodgers, SVP, Global Shared Services, <a href="#">Stagwell</a>   | <b>CASE STUDY   From Local Legacy to Global Unity: Standardize in a Verticalized Enterprise</b><br><br>Amy Wirges, Global Head Operations and Shared Services, Business Assurance, <a href="#">SGS</a> | <b>De-Risk Procurement Outsourcing by Balancing Governance, Innovation, and Control</b><br><br>Joe Abraham, Global Business Services Program Manager, <a href="#">Microsoft</a>   | <b>FIRESIDE CHAT   Capture the Full Value of Shared Services Transformation with Measurements that Matter</b><br><br>Ashlie Crosby, SVP, Global Business Solutions Center, <a href="#">Mastercard</a>   | <b>CASE STUDY  From Support to Strategic: Building the Commercial Services Arm of GBS</b><br><br>Isaac Knoot, VP, Global Business Services, <a href="#">Boston Scientific</a><br><br>David Thompson, VP, GBS Commercial Services, <a href="#">Boston Scientific</a> |
| 12:45 pm            | <b>Transition Break</b>  |   |  |   |   |   |
| 1:25 pm             | <b>Setting the Industry Standard: An Inside Look AT J&amp;J Global Services Payroll Transformation</b>   |   |  |   |   |   |
| 2:00 pm             | <b>End of SSOW - See You Next Year!</b>  |   |  |   |   |   |

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**ADD-ONS**

| Site Tours   |              | SSOWomen's Day |              | Awards Gala Pass for 1 |              | Agentic AI in Shared Services Bootcamp |              |
|--------------|--------------|----------------|--------------|------------------------|--------------|--|--------------|
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# ADDITIONAL RESOURCES



## SSOW 2026 Teaser Trailer

Step inside the SSOW on-site experience—from leadership boardrooms and peer connections to iconic celebrations marking 30 years of shared services excellence.

[VIEW](#)



## North America's Shared Services Transformation 2026: AI, Experience, Talent, and Enterprise Value

The leading benchmarking resource for shared services and GBS 2026 success—revealing where peers are investing, transforming service models, embedding AI, and proving enterprise value.

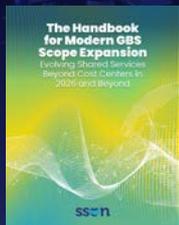
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## Step Into the Energy of SSOWomen's Day

SSOWomen's Day brings the community together—powerful women and allies connecting on-site to celebrate leadership, spark bold dialogue, and drive real progress across shared services and GBS.

[VIEW](#)



## The Handbook for Modern GBS Scope Expansion: Evolving Shared Services Beyond Cost Centers in 2026 and Beyond

This essential GBS handbook reveals how scope expansion unlocks enterprise value—exploring the trends, strategies, frameworks, and real-world examples shaping the next era of GBS maturity.

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## The Next Step in Automation for GBS: Agentic AI That Acts

A practical guide to agentic AI in GBS—perfect prep for the Bootcamp—showing how leaders deploy governed agents to improve controls, recover revenue, and accelerate financial close.

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## 2026 SSON North American Impact Awards Brochure

Your complete guide to the SSON Impact Awards—covering the application process, judging criteria, key dates, and what to expect on-site at the SSOW Black-Tie Awards Gala.

[VIEW](#)



## GBS Leaders Unplugged – Tage Smith on Leading Technology Shared Services & Driving Innovation

Filmed on-site at SSOW, this interview features Pacific Life's Tage Smith sharing insights on tech shared services leadership, innovation, inclusion, and SSOWomen's Day.

[VIEW](#)



## Approval Kit

Need help getting approval to attend? This kit gives you the cost breakdown, talking points, and ready-to-use letter to make your case.

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