

REGISTER



95% NEW END  
USER SPEAKERS!

Reshaping Business Processes



# INTELLIGENT AUTOMATION WEEK CHICAGO

**RPA ■ COGNITIVE ■ AI**

F&A, IT, SHARED SERVICES, CONTACT CENTERS & MORE

July 30 – August 2, 2018

Chicago Marriott Downtown Magnificent Mile

[intelligentautomation.iqpc.com](http://intelligentautomation.iqpc.com)

# ARE YOU READY TO GET UP TO SPEED TO ALL THINGS IA?

We're very excited the leading event in RPA, Cognitive Intelligence, and AI is back! Join us for our highly-anticipated **Intelligent Automation Week Chicago 2018** conference in Chicago this July 29th - August 2nd!

Bringing together a speaker faculty of **95% new faces** with new insights, ideas, and content to share, you can't miss out on this chance to take your IA program to the next level. From IT to contact centers, from organizations with advanced IA strategies in play to those who are just starting out, our customizable program allows you to create an unique experience you won't get at any other Intelligent Automation event.

## EARN UP TO 20 CPE CREDITS!

Penton Learning Systems LLC/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 website: [www.nasbaregistry.org](http://www.nasbaregistry.org). Reference to the new [www.nasbaregistry.org](http://www.nasbaregistry.org) website should be included the first time your promotional materials are updated following the launch of the site September 1, 2016.

KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

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# ATTENDEE BREAKDOWN

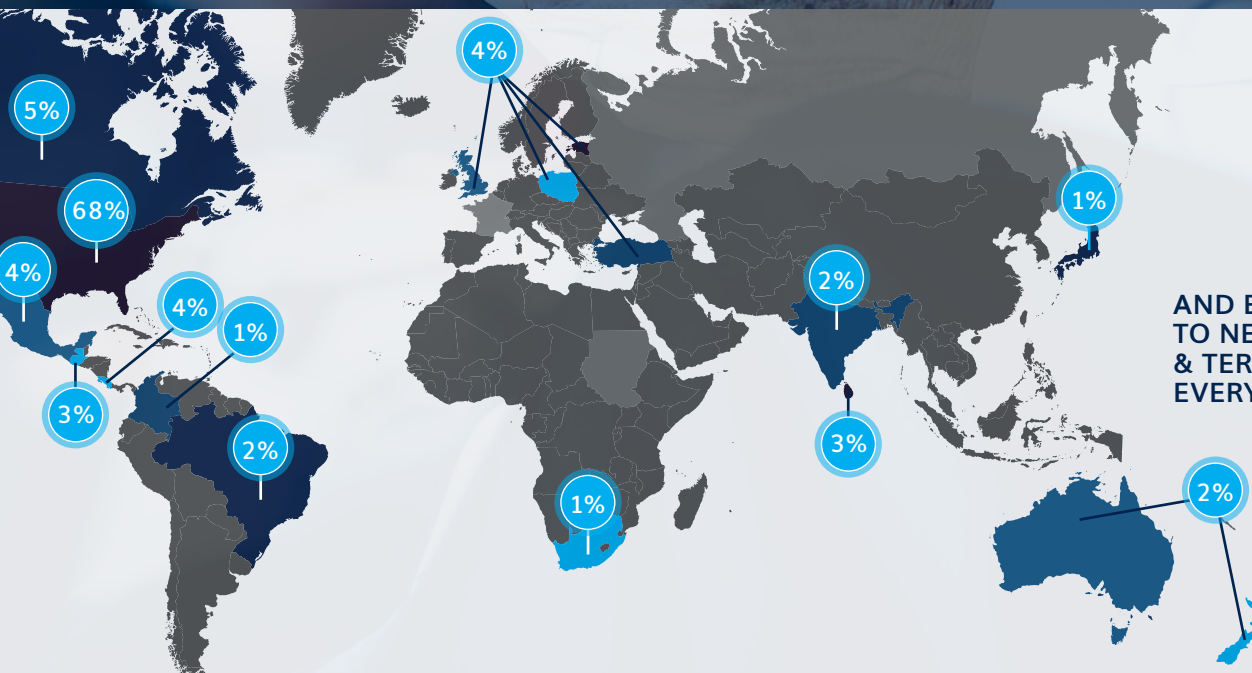
## SENIORITY BREAKDOWN

9%	C-Suite
23%	SVP, VP & AVP
34%	Director
27%	Manager
7%	Other

## INDUSTRY BREAKDOWN

25%	Banking, Finance & Insurance	6%	Construction, Engineering, Mining, Energy, Oil & Gas
15%	IT, Technology & Software	5%	Transportation & Logistics
10%	Medical Supplies, Pharmaceuticals, & Health Care	4%	Manufacturing
9%	Consulting	3%	Aerospace & Defense
7%	Food & Beverage	9%	Other (Retail, Legal, Real Estate, Agriculture, etc.)
7%	Media, Social Media & Entertainment		

## IA GLOBAL FOOTPRINT



AND EXPANDING  
TO NEW MARKETS  
& TERRITORIES  
EVERY DAY!



# A FEW TESTIMONIALS

*"People should attend to learn how industry leaders are leveraging best practices and the latest technologies to automate their business."*

AJ Bernstein, Senior Director,  
Financial Shared Services, LinkedIn



*"IQPC's Intelligent Automation conference in Chicago had something for everyone: those still discovering the possibilities of RPA to seasoned practitioners running hundreds of bots seeking ways to mature their operations. These events provide a great place to learn and connect with others who are in the trenches."*

Paul Bartley, Director Global  
Shared Services, BD



*"The Automation Earth Center has landed."*

Jordane Elmassian, Vice President,  
Analytics & Automation, Shared  
Service Center, MasterCard





# IS IT POSSIBLE TO GET EVEN BIGGER & BETTER? **YES, ABSOLUTELY!**



## INTELLIGENT AUTOMATION WEEK AUSTIN

December 3 – 6, 2018

As difficult as it may be to imagine considering how impressive our **Intelligent Automation Week – Chicago 2018** conference is this year, we have already begun to develop our **Intelligent Automation Week – Austin 2018's** program and it's already at a stage that will knock your socks off!

### WHAT CAN YOU EXPECT...

- Over 75 Practioner Speakers
- 70+ Sessions
- Four (4) Days of In-Depth IA Content - RPA, AI, Cognitive, Machine Learning & More!
- Pre-Conference Workshops
- IA Technology User Group Focus Day
- A Wide Variety of IA Stories , Diverse in Industry, Functionality, and Maturity Levels

### SHORT LIST OF THE 32 SPEAKERS ALREADY ON BOARD....

- Michael Machado, *Delivery Lead - Smart Process Automation & Robotics Center, Fannie Mae - NEW*
- Kenan Erkan, *Financial Controller, Asia & Pacific, IFC - International Finance Corporation - NEW*
- Jim Maastricht, *Personal Lines Data and Technology Director, American Family Insurance - NEW*
- Scott M. Weber, *Vice President, M&T Bank – NEW*
- Ryan Burns, *Business Process Lead, Empire Life – NEW*
- Iris Gregoriou, *Assistant Vice President, Head of Continuous Improvement, Investment Division, Manulife – NEW*

### Sponsors:



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# BOTS BOARD



**Henry Lyles**  
Director Global  
Business Services  
Data Excellence &  
Automation  
**McDonald's  
Corporation**



**Mona Kahn**  
Director of  
Technology - Head  
of Intelligent  
Automation  
**Fannie Mae**

NEW



**Ryan Davis**  
Senior Vice  
President,  
Procurement  
Management  
**Bank of America**



**Curt Burghardt**  
Vice President, HR  
Shared Services &  
HR Systems  
**Walgreens**



**Arindam  
Mukhopadhyay**  
Managing Director,  
Global Head of  
Strategy, Reporting  
and Information  
Security Ops  
**Citi**



**John Cottongim**  
CFA  
Automation  
Director  
**Mars**

NEW



**AJ Bernstein**  
Senior Director,  
Financial Shared  
Services  
**LinkedIn**



**Delphine Bernard**  
Global Head of  
Finance Operations  
**Uber**

NEW



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# KEYNOTE SPEAKER



## Terry Jones

*Founder & Former CEO, Travelocity*  
& *Founder, Kayak.com*

Booking travel was made easy, accessible and self-reliant when Terry Jones disrupted the business of travel booking and founded Travelocity.com, the first website that allowed consumers to reserve, book, and purchase travel online without going to a travel agency. With more than four decades in the travel industry and extensive expertise on the rapidly changing digital world, Jones will provide eye-opening insight on the advantages of being a disruptor and the business of innovation, including leadership in a wired world, the importance of building digital relationships, and the "third channel"—the idea that the Internet can create the most personal customer relationship.



# SPEAKERS AHEAD OF THE CURVE



Alex Kazlouski  
Senior Director, Workforce  
Planning & Management  
**EPAM Systems**

NEW



Angel Lopez  
Global Operational  
Controller  
**The AES Corporation**

NEW



Samir Bagri  
Director, Global Business  
Services  
**Aptiv**

NEW



Mini Suri  
Senior Vice President  
**Citi**

NEW



Jay Desai  
Senior Director Head,  
Outsourcing Strategy &  
Governance – CoE  
**AbbVie, Inc.**

NEW



Karlee Moore  
Global OCM Lead -  
Financial Services  
**Eli Lilly and Company**

NEW



Albert Rees  
Senior Vice President, Head  
of Business Consulting,  
North America  
**EPAM Systems**

NEW



Amory Booher  
Senior Vice President -  
Model, Vendor, and Retail  
Underwriting Systems  
Architecture  
**BBVA Compass**



Jasmine Tehara  
Vice President, Business  
Optimization, Investment  
Division  
**Manulife**

NEW



Lori Bondar  
Vice President, Controller &  
Chief Accounting Officer  
**Avery Dennison**

NEW



Greg Meinhardt  
Director of Finance  
Operations  
**CH Robinson**

NEW



Josh Remacle  
Digital Workforce Leader  
**Koch Business Solutions  
(KBS)**

NEW



Juan Esteban Solano  
GBS IT Service Operation,  
Americas  
**Bacardi**

NEW



Anil Bhavnani  
Director – BPO Operations,  
Global Financial Solutions -  
Shared Services, GFS office  
in India  
**Pfizer, Inc**

NEW



Sameer Naik  
Lead SAP Systems Engineer  
**ConAgra Foods**

NEW



Joseph Magliacano  
Robotic Process  
Automation Analyst  
**Asurion**

NEW



Richard Mackey  
Senior Vice President,  
Information Technology  
**Intalere**

NEW



Cari Covert  
Vice President, Intelligent  
Automation  
**Canadian Tire  
Corporation**

NEW



Nadia de Vila  
Associate Vice President,  
Business Optimization,  
Investment Division  
**Manulife**

NEW



Jamel Jones  
Director, IVR Operations  
**Comcast Cable**

NEW



Alicia Musgrove  
Director, HR Shared  
Services  
**Walmart**

NEW

# SPEAKERS AHEAD OF THE CURVE



**Jeff Machols**  
Vice President, Head of Continuous Improvement Center  
**Voya Financial**

NEW



**Michael Gilfix**  
Vice President, Digital Business Automation  
**IBM Hybrid Cloud**

NEW



**Shafi Yusuf**  
Senior Vice President, Head of Reengineering Transformation & Digitization and Robotics Automation  
**Bank of the West**

NEW



**Delphine Bernard**  
Global Head of Finance Operations  
**Uber**

NEW



**Manish Jain**  
Senior Director, Strategic Program Delivery  
**Royal Bank of Canada**

NEW



**Karen Cheung**  
Senior Manager - Digital Labor (RPA/RDA), Work & Performance Management  
**Southern California Edison**

NEW



**Regina Viadro**  
Vice President, Co-Head East & Midwest, IA Practice Adviser  
**EPAM Systems**

NEW



**Jeff Kudrle**  
Director, Innovation - Data Strategy, Governance & Process Excellence  
**The Coca-Cola Company**

NEW



**Douglas Ausnehmer**  
Director, Supplier Management Office  
**Abbott**

NEW



**Mona Kahn**  
Director of Technology - Head of Intelligent Automation  
**Fannie Mae**

NEW



**Seth Goldberg**  
Senior Account Manager  
**Softomotive**

NEW



**Sharath Gopinath**  
Program Manager, IT - Finance, Digital Transformation & RPA  
**Bacardi**

NEW



**Barry Mitchell**  
Global Offering Leader  
**IBM Automation**

NEW



**Tyler Bent**  
Global Finance Program Leader  
**AIG**

NEW



**Dr. Setrag Khoshafian**  
Chief Evangelist & Vice President of BPM Technology  
**Pega**

NEW



**Vartul Mittal**  
Former Business Process Transformation Specialist, Assistant Vice President - Continuous Improvement, LEAN & RPA, **Barclays**

NEW



**Todd Lohr**  
Principal, Technology Enabled Transformation  
**KPMG**

NEW



**Fernando Nunes**  
Senior Process Automation Architect  
**MAN Diesel & Turbo**

NEW



**Matt Fleckenstein**  
Chief Marketing Officer  
**Nintex**

NEW



**Bill Galusha**  
Director, Product Marketing  
**ABBYY**

NEW



**Joe Hassenplug**  
Senior Automation Engineer, FSI  
**Office Depot, Inc.**

NEW



**Joanne Griffin, FCA**  
EMEA Controller & Global Lead - Quality Insights  
**LinkedIn**

NEW



**Barbara Hodge**  
Global Online & Digital Content Editor  
**SSON**

NEW

# SPEAKERS AHEAD OF THE CURVE



Steve Carpenter  
Executive Director,  
Global Business  
Services Technology  
Merck & Co

NEW



Eric Liebross  
Senior Managing  
Director, Operations  
Auxis

NEW



Max Cheprasov  
Chief Automation  
Officer  
Dentsu Aegis  
Network, USA

NEW



Ted Shelton  
Chief Customer Officer  
Catalytic, Inc.

NEW



Tamera Smith  
Manager, Digital  
Innovation Support &  
Compliance, Smart  
Process Automation &  
Robotics Center  
Fannie Mae

NEW



Hector Chahin  
Director Employee  
Experience and  
Analytics, PMO-Human  
Resources  
United Airlines

NEW



Edward Brooks  
Founder  
The RPA Academy

NEW



Nikhil Hasija  
Founder & Chief  
Product Officer  
Azuqua

NEW



Anupam Govil  
President & Partner  
Avasant

NEW



Leo Dehmer  
Director of Sales  
Kryon Systems

NEW



Sandor Bathory  
Principal, Automation  
Services  
Agilify Automation

NEW



Atul Soneja  
Head of Business  
Development  
EdgeVerve (an Infosys  
company)

NEW



Danny Thompson  
Senior Vice President,  
Market and Product  
Strategy  
APEX Analytix

NEW



Gene Chao  
Vice President &  
General Manager  
IBM Automation

NEW



Avnish Singh  
Assistant Vice President,  
Head of Business  
Applications  
EdgeVerve (an Infosys  
company)

NEW



Rochelle A. Hood  
PMP, Global Head of  
Customer Analytics and  
Research  
SSON

NEW



Neeladri Roy  
Senior Director,  
Technology Solutions  
EPAM Systems

NEW



Judith Williams  
Global Workforce  
Management Leader  
and Partner  
Mercer

NEW



Ying Chen  
Head of Product  
Marketing, Platform  
Technologies  
Pega Systems

NEW



Ritesh Jain  
Associate Vice President  
& Head of Automation,  
HCL Business Services  
HCL Business Services

NEW



Chris Gilmore  
PMP, Application  
Technology Leader  
Aetna

NEW



Kamal Chin  
Senior Program  
Management Lead,  
Intelligent Automation,  
Finance Shared Services  
LinkedIn

NEW



Manish Ballal  
Associate Director,  
Business Development  
Edgeverve

NEW



Shrikant Deo  
Product Manager  
Edgeverve

NEW



# SPEAKERS BACK BY POPULAR DEMAND



Pankaj Chowdhry  
CEO & Founder  
**FortressIQ**



Scott Furlong  
Partner, Head of  
Business Advisory  
Services  
**Information Services  
Group (ISG)**



Kane Peschl  
Robotic Solutions  
Specialist  
**Redwood Software**



Mark Davison  
Global Partner, Robotic  
Process Automation &  
Cognitive  
**Information Services  
Group (ISG)**



AJ Bernstein  
Senior Director, Financial  
Shared Services  
**LinkedIn**



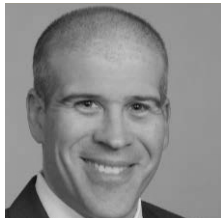
Craig Ackerman  
Global Head, RPA  
**Chazey Partners**



Lee Coulter  
Senior Vice President,  
**Ascension** & Chief  
Executive Officer,  
**Ascension Shared  
Services** & Chair,  
**IEEE Working Group on  
Standards in Intelligent  
Process Automation**



Derek Toone  
ice President, Sales, Americas  
at Digital Workforce / RPA  
Leader  
**Automation Anywhere Inc.**



Ryan Davis  
Senior Vice President,  
Procurement  
Management  
**Bank of America**



Jon Theuerkauf  
Advisor  
**The Improve and  
Innovate Company**  
& Former Managing  
Director/Group Head of  
Performance Excellence  
**BNY Mellon**



Curt Burghardt  
Vice President, HR  
Shared Services & HR  
Systems  
**Walgreens**



Ashwin Ashok  
Director, Robotic  
Process Automation &  
Technology Leader  
**Automation Anywhere**



Ian Barkin  
Chief Strategy Officer  
**Symphony Ventures**



Henry Lyles  
Director Global Business  
Services Data Excellence  
& Automation  
**McDonald's  
Corporation**



Brad DeMent  
Partner & Leader of  
Finance Practice  
**ScottMadden**



James Walker  
Automation Director  
**Mars**



Pam Wolfe  
Division Chief  
**NASA**



Trey Robinson  
Partner  
**ScottMadden**



Brent LaRoche  
LSSMBB, MBA, Principal,  
Operational Excellence  
**Agilify Automation**



Phil Searle  
Founder & CEO  
**Chazey Partners**



Jake Howard  
Director Sales &  
Business Development-  
UK & EMEA  
**Softomotive**



Rajesh Agarwal  
Senior Vice President  
& Head – Process  
Engineering  
**Datamatics**



Lonnie Johnston  
Vice President Sales  
**NICE Systems**



John Cottongim, CFA  
Automation Director  
**Mars**

# IA EXPERIENCES

Pre-Conference  
Exhibit Hall  
Preview &  
Champagne  
Toast

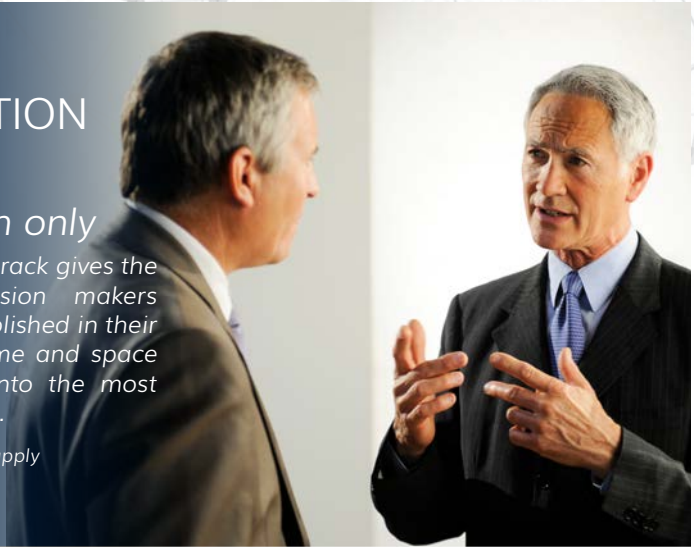


## IA EVOLUTION ROOM

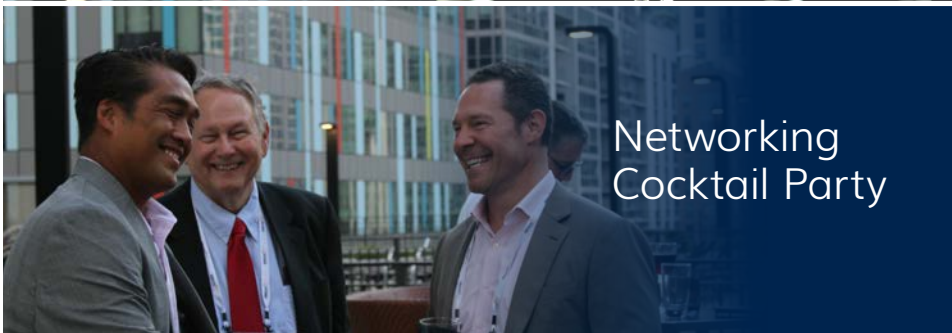
*By invitation only*

*This closed-door track gives the senior-level decision makers already well established in their IA journey the time and space for deep dives into the most pressing IA topics.*

*Selection criteria will apply*



Networking  
Cocktail Party



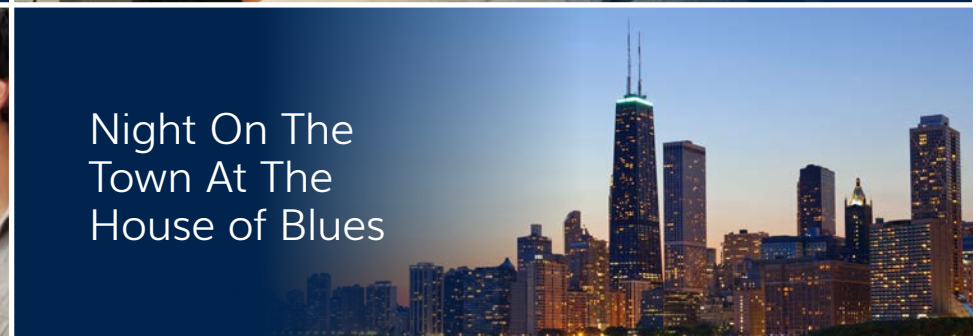
Demo  
Drive



Lunch  
Cliques



Night On The  
Town At The  
House of Blues





# FROM BOTS TO BLUES!

*Enjoy a night out on the town after a day of workshops when you join us at the House of Blues Chicago for a private cocktail hour! This exciting night is just one of the great experiences you will have at IA Week Chicago 2018.*





# SOMETHING FOR EVERYONE

## MATURITY CURVE TRACKS

No matter what stage your organization may be with its IA programs, the Intelligent Automation Week – Chicago 2018 conference has a wide variety of sessions to choose from that will enable your team to prepare for, and/or improve upon their current IA initiatives. Are your functional departments in various stages of IA maturity? Well no worries, you and your various department Heads/team can mix up which sessions they go to throughout the entire conference, jumping from one maturity curve session to another.

### PLANNING & LAUNCHING

- WORKSHOP A: Step One To Starting Your Intelligent Automation Journey – IA Bootcamp!
- Determining If Intelligent Automation Is Indeed Right For Your Business Operations
- Panel Discussion: The Big "?" – Does My Organizations' IA Programs Actually Need A Coe?



### EVOLVING

- WORKSHOP B: Establish & Manage A Best In Class Intelligent Automation Coe (Center Of Excellence)
- Panel Discussion: Best In Class Intelligent Automation Centers Of Excellence (Coe)
- Panel Discussion: Effective BPO Sourcing & Management



### MATURING

- WORKSHOP F: Utilize Artificial Intelligence & Cognitive Technologies To Enhance Customer Delivery Into Your Contact Center
- How To Successfully Plan & Implement An Effective Artificial Intelligence & Machine Learning Program
- When To Kill A Bot & Why Would You?



# HITTING YOUR SWEET SPOT

During the IA Workforce Management & Focus Track sessions and UiPath Workshop, delegates will be able to attend sessions designed to their specific area of job functionality focus and stage of IA Talent Management they are at with their IA program/s.

## IA WORKFORCE MANAGEMENT TRACKS

- Recruit IA Top Talent
- IA Top Talent Transitional Phase
- Retrain & Retain Ia Top Talent



## FUNCTIONAL TRACKS

### SHARED SERVICES...

- Intelligent Automation For Mid-Cap SSCs
- How IA Can Turn Shared Services Into A Revenue Stream For The Business

### IT...

- Panel Discussion: Ensuring Cybersecurity Integrity As IA Technologies Evolve Contact Centers
- Panel Discussion: When Your Bots Get Sick - How To Manage Program Delivery Expectations & Get Out Of The Weeds

### CONTACT CENTERS...

- Panel Discussion: Mail Order Bots - How To Find Your Bot Soul Mate
- Modernize Your Phone Channel Approach With Intelligent Automation

## UIPATH WORKSHOP: HOW TO SUCCESSFULLY UTILIZE THE UIPATH PLATFORM

Join your fellow IA tech community for this 3-hour interactive demonstrative session focused on how to best utilized UiPath's platform for a wide variety of functional purposes. Topics of discussion, analysis, and on-site problem solving tasks will include, yet will not be limited to: Nuts & bolts of how to best use UiPath's platform, exploring any tech problems that may confuse and the instructions and solutions to x.

Hosted by: UiPath





# INTERACTIVE DISCUSSION GROUPS (IDGs)

During this part of the conference, delegates will be sorted into groups of 20 to take part in Interactive Discussions Groups (IDGs) around the below topics. Upon registering, you must choose your top two (2) IDG topics (11:20am & 12:10pm IDGs) and everyone will rotate between their two (2) choices, in back-to-back 40-minute intervals. There will be a ten (10) minute transitional break between the 11:20am & 12:10pm sessions.



1 IA TECHNOLOGIES TO OPTIMIZE HR PROCESSES	2 WHO'S WHO?: HOW TO DETERMINE YOUR IA SUPPORT PARTNERSHIPS	3 THE EVOLVING WORKFORCE LANDSCAPE - HOW AGILITY MUST BE A TOP PRIORITY FOR YOUR IA PROGRAMS	4 HOW MANY BOTS DO WE NEED?
5 STAKEHOLDER & CUSTOMER BUY- IN, ENGAGEMENT & COLLABORATION TO ENSURE IA PROGRAM SUCCESS	6 WHAT WE WISH WE KNEW BEFORE OUR IA ROLL OUT	7 RPA JOURNEY: STARTING SMALL & SCALING UP	8 CROSS-INDUSTRY AND CROSS- FUNCTIONAL BENEFITS OF INTELLIGENT AUTOMATION
9 YOUR COE & IT DEPT. "FRICTION": C-3P0 VS. R2-D2	10 ADDING CONTENT INTELLIGENCE TO YOUR RPA STRATEGY	11 INTELLIGENT AUTOMATION TO DETECT, ANALYZE & REDUCE A VARIETY OF FRAUDULENT ACTIVITY	12 IA VENDOR COMPARISONS & CAPABILITY ANALYSIS
13 WE WENT WITH X IA SOLUTION, NOW HOW DO WE OPERATIONALIZE?	14 ENSURING IA WORKFORCE DIVERSITY	15 IN-HOUSE CUSTOMIZED IA TECHNOLOGY SOFTWARE DEVELOPMENT & MANAGING YOUR OWN IA INITIATIVES	CHOOSE TWO TO ATTEND!



# IA EVOLUTIONS LOUNGE

*By Invitation Only*

The Intelligent Automation Chicago 2018 conference gives you a great opportunity to learn about the latest trends and research, meet new people and connect with old friends. But how do you get the in-depth conversation and insights you crave with senior-level executives level like you? The IA Week Evolutions Tracks offers you just that!

If you meet the pre-requisites, plan to attend some or all of these sessions designed to discuss very mature IA topics with like-minded for senior-level executives. You'll spend quality time with other individuals who lead Intelligent Automation programs for their organizations.

## **Want to Attend these Sessions? The Criteria Includes:**

Access to the IA Evolutions Lounge is available solely to individuals who meet at least three (3) of the below criteria:

As an individual, you have...

- 5+ years of experience in Intelligent Automation roles (practitioner led)
- Responsibility over multiple functions in Intelligent Automation initiatives (i.e. F&A, IT, Contact Centers, HR, etc.)
- Responsibility over multiple regions that have Intelligent Automation programs in place

The Organization You Work for has or is...

- An IA program that has been in place for at least 2 years or more
- 10+ live/active bots and covering a minimum of 2 process areas
- Utilizing two or more automation tools
- CoE or IA Team consists of at least 20 individuals
- Gone through an internal, and/or external audit process
- Dealt with or are dealing with IT

Hosted by: **IBM**



KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

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VENUE

PRICING &  
REGISTRATION

BUSINESS PROCESSES WILL NEVER BE THE SAME

# AGENDA

# PRE-CONFERENCE WORKSHOPS

MONDAY, JULY 30, 2018

8:00am REGISTRATION FOR WORKSHOP A & B AND NETWORKING BREAKFAST

*All conference attendees must pre-register for one (1) of the two (2) concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.*

## WORKSHOP A: STEP ONE TO STARTING YOUR INTELLIGENT AUTOMATION JOURNEY – IA BOOTCAMP!

No one is left behind in this workshop as we will cover what success looks like from an automation newbie through I've run out of ideas automation expert. Some are just starting but don't know how to get started, some have started but didn't get the results quick enough, and some have started and are looking for new ideas. We will cover it all in this hands on workshop and you can expect to come out with a new sense of intelligent automation direction

By attending this workshop, you will:

- Gain valuable insight of a proven intelligent automation methodology
- Learn about how to avoid potential obstacles that can derail your intelligent automation program

**Sandor Bathory**, Principal, Automation Services, **Agilify Automation**

**Brent LaRoche**, LSSMBB, MBA, Principal, Operational Excellence, **Agilify Automation**

## WORKSHOP B: ESTABLISH & MANAGE A BEST IN CLASS INTELLIGENT AUTOMATION COE (CENTER OF EXCELLENCE)

Is your organization evaluating the need to establish a CoE for your IA program, and/or would like to increase its effectiveness? If so, then this deep dive CoE session is a perfect way to learn more about how to do just that.

In this session, we will discuss:

- Various CoE models, such as: hybrid, functional, etc.
- How to establish (or enhance) an effective governance and centralized structure to support your organization's intelligent automation CoE initiatives
- Effective CoE and governance process models
- Risk, Controls & Audits
- Chargeback models and would they work for your CoE
- Methods to successfully develop and manage effective change management initiatives - and effective PR, marketing, and communication plans

**Craig Ackerman**, Global Head, RPA, **Chazey Partners**

**Phil Searle**, Founder & CEO, **Chazey Partners**

8:30am

10:15am REGISTRATION FOR WORKSHOP C & D AND MORNING NETWORKING BREAK

*"The conference was extremely informative and I appreciated being able to hear from the software providers and companies that are currently using RPA. I'm excited about exploring RPA further to determine applicability for our organization."*

Corporate Vice President, **New York Life Insurance Company**



## PRE-CONFERENCE WORKSHOPS

MONDAY, JULY 30, 2018

All conference attendees must pre-register for one (1) of the two (2) concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.

### WORKSHOP C: READY, SET, GO! – EFFECTIVE IA PROOF OF CONCEPTS (PoCs) SOONER VS. LATER

There has been a lot of chatter in the IA space concerning what should be included in an IA PoC and how long it should take to develop.

As you may have heard, developing an effective IA PoC isn't as painful as it may seem at first and you can realistically complete the project in just a few short weeks versus months.

Increase your odds of stakeholder buy-in by attending this session and learning how to develop an effective PoC that warrants your stakeholders' attention and approval.

In this workshop, we will discuss:

- Realistic project objectives and timelines
- IA rollout infrastructure, cost, and licensing details that must be considered and included in your PoC
- How to develop a clear-cut presentation of your IA goals, objectives, scope, and success criteria/KPIs so to speak in a language that can be easily understood by a variety of stakeholders

**Mark Davison**, Global Partner, Robotic Process Automation & Cognitive, Information Services Group (ISG)

**Scott Furlong**, Partner, Head of Business Advisory Services, Information Services Group (ISG)

### WORKSHOP D: INTELLIGENT AUTOMATION MARKETING STRATEGIES SHOW & TELL

This very unique interactive session will be split into several parts.

**Part 1** - Our Workshop leaders will give an overview presentation of a few IA marketing strategies that have been utilized by a variety of organizations to "sell" Intelligent Automation internally, showing: 1) what can be done, 2) what has worked well, 3) and how to go about doing x – from the samples provided by the session speakers.

**Part 2** - the session will turn into a show & tell dynamic amongst the audience members and speakers, so the group can discuss, either: 1) what they, and/or their organization has done thus far, either successfully or not so successfully, 2) other IA marketing strategies they have heard of and would like to discuss further.

**Please note, all attendees must come to this session prepared to participate, – bringing samples of IA marketing strategies they want to share with the group as a show & tell process – which do not need to be from their organization.**

Attend this very interactive Workshop to learn about:

- Marketing messaging designed for a variety of departments, individuals, and teams that will help you avoid miscommunications' mishaps and/or disasters
- Realistic timelines to set up and maintain a variety of IA communications programs to ensure IA roll out success
- Communication platforms that may be best for your IA marketing strategy such as: social media sites, internal customer support portals/ contact centers, your website, etc.

**Karlee Moore**, Global OCM Lead - Financial Services, **Eli Lilly and Company**

### REGISTRATION FOR WORKSHOP E & F AND AFTERNOON NETWORKING BREAK

*"Best conference I have ever attended! Comprehensive, hands on, collaborative and sustainable information."*

Vice President of Finance Lead and Global Operations, **AIG**

10:30am

12:15pm

# PRE-CONFERENCE WORKSHOPS

MONDAY, JULY 30, 2018

All conference attendees must pre-register for one (1) of the two (2) concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.

## WORKSHOP E: EARN BIG GAINS BY STARTING OFF SMALL WITH A RPA PILOT PROGRAM

In the past few years, many organizations have reaped great rewards by testing out RPA as a pilot program on a small-scale basis before scaling up or expanding their RPA initiatives to other departments within their organization.

By starting small with a RPA pilot program, monitoring your successes and failures along your journey, you're able to take the lessons learned and move onto a wide variety of other RPA expansion plans with greater probability of success.

In this workshop, we will discuss:

- How to determine which department functionalities would be best suited for a RPA pilot program based upon its transactional volume stats, regulations and transparency standards x department must adhere to
- Effective RPA roll-out plans, with goals that should be met, how long it should take to implement, how and what to track as success and failure measurements
- Methods to help you determine if you're RPA pilot program has been a success – and knowing when it's time to scale-up, and/or expand your RPA program/s

Greg Meinhardt, Director of Finance Operations, CH Robinson

Ritesh Jain, Associate Vice President & Head of Automation, HCL Business Services, HCL Business Services

\* Boxed lunches provided to all Workshop E attendees.

## WORKSHOP F: UTILIZE ARTIFICIAL INTELLIGENCE & COGNITIVE TECHNOLOGIES TO ENHANCE CUSTOMER DELIVERY INTO YOUR CONTACT CENTER

Topics of discussion will include, yet will not be limited to:

- Enhanced customer delivery and business intelligence via powerful data analytics
- Examination of a variety of AI & cognitive technologies and their capabilities, costs, and implementation requirements
- Various uses of AI & cognitive technologies, which go beyond a Call Centers' functionality focus
- Regulations' compliance

Manish Ballal, Associate Director, Business Development, Edgeverve

Shrikant Deo, Product Manager, Edgeverve

Hosted by: Edgeverve

\* Boxed lunches provided to all Workshop F attendees.

## REGISTRATION FOR WORKSHOP G & AFTERNOON NETWORKING BREAK





# PRE-CONFERENCE WORKSHOPS

MONDAY, JULY 30, 2018

KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

SPONSORS &  
EXHIBITORS

VENUE

PRICING &  
REGISTRATION

## WORKSHOP G: TRUE PROCESS-CENTRIC ROBOTICS ADDS INTELLIGENCE TO YOUR AUTOMATION

Open to all Pre-Conference Workshop Day attendees!

In this transformational session, you'll hear from Bacardi Limited as they share the details of their Intelligent Automation journey, including:

- Company goals for intelligent automation in their finance / digital transformation
- Selection criteria, and process for choosing a Robotics solution
- Addressing compliance and controls
- Planning and implementation with lessons learned
- Robotics results and expansion plans
- Q&A

Complimenting Bacardi, Redwood Software will also share a Robotics demonstration of selecting and assembling robots in a process with workflow and process orchestration.

**Sharath Gopinath**, *Program Manager, IT – Finance, Digital Transformation & RPA*, **Bacardi**

**Kane Peschl**, *Robotic Solution Specialist*, **Redwood Software**

## WORKSHOP H: DESIGNING A PROGRAM THAT INCREASES YOUR "ROBOT VELOCITY"

If analysis paralysis is holding your organization back, attend this bonus session! Accelerating developmental pilots and physically demonstrating RPA value will educate your stakeholders more than brochures, internet articles, or even RPA conferences.

ScottMadden will present a proven process to:

- Identify the right stakeholders to propel your program
- Select high value processes and setup quick test environments,
- Define CoE governance that works for all digital automation, not just RPA

**Brad DeMent**, *Partner & Leader of Finance Practice*, **ScottMadden**

**Trey Robinson**, *Partner*, **ScottMadden**

## CLOSE OF PRE-CONFERENCE WORKSHOP DAY

## EXHIBIT HALL PREVIEW & CHAMPAGNE TOAST

Join us in the Expo Hall for a sneak peak of the IA solution providers' booths and toast to a great event!

## EVENING SOCIAL GATHERING

Night on the town at the House of Blues!

## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

8:00am REGISTRATION FOR MAIN CONFERENCE DAY ONE &amp; NETWORKING BREAKFAST

8:40am **SSON WELCOME ADDRESS**  
*Jules Miller, Senior Conference Producer, SSON/IQPC*8:50am **CHAIRMAN'S DAY ONE OPENING REMARKS**  
*Todd Lohr, Principal, Technology Enabled Transformation, KPMG*9:00am **KEYNOTE ADDRESS: BUILDING RELATIONSHIPS IN AN INCREASINGLY DIGITAL WORLD**  
Booking travel was made easy, accessible and self-reliant when Terry Jones disrupted the business of travel booking and founded Travelocity.com, the first website that allowed consumers to reserve, book, and purchase travel online without going to a travel agency. With more than four decades in the travel industry and extensive expertise on the rapidly changing digital world, Jones will provide eye-opening insight on the advantages of being a disruptor and the business of innovation, including leadership in a wired world, the importance of building digital relationships, and the "third channel"—the idea that the internet can create the most personal customer relationship.  
*Terry Jones, Founder & Former CEO, Travelocity & Founder, Kayak.com*9:40am **CASE STUDY: MAN DIESEL: AUTOMATING, ORCHESTRATING & OPTIMIZING YOUR OPERATIONS WITH INTELLIGENT PROCESS AUTOMATION**  
Advanced manufacturing has been on the leading edge of automation for decades, leveraging robotics to automate supply chains and production lines. However, they have lagged in terms of applying automation to their business processes. In this session, you will learn how Man Diesel has used Intelligent Process Automation to automate, orchestrate and optimize operations across nearly 15,000 employees located in more than 100 different facilities.  
Attend this session to learn:  

- What is the role of Robotic Process Automation (RPA) and what are its strengths/weaknesses
- What other technologies should you be leveraging beyond RPA (e.g., workflow, forms, document generation, process intelligence) to fully automate and optimize your business processes
- The value of adopting a "crawl, walk, run" approach to your Intelligent Process Automation strategy

*Fernando Nunes, Senior Process Automation Architect, MAN Diesel & Turbo*  
Moderator: *Matt Fleckenstein, Chief Marketing Officer, Nintex*  
Hosted by: **Nintex**10:20am **MORNING NETWORKING BREAK & DEMO DRIVE**  
Join us in the Expo Hall for our 1st Round of the exhibitors' IA solutions demonstrations & conversation. Grab a Demo Card and head to the booths!



## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

## INTERACTIVE DISCUSSION GROUPS (IDGs)

During this part of the conference, delegates will be sorted into groups of 20 to take part in Interactive Discussions Groups (IDGs) around the below topics. Upon registering, you must choose your top two (2) IDG topics (11:20am & 12:10pm IDGs) and everyone will rotate between their two (2) choices, in back-to-back 40-minute intervals. There will be a ten (10) minute transitional break between the 11:20am & 12:10pm sessions.

All conference attendees must pre-register for their two (2) IDGs upon registering for the event. IDGs registrations will be on a first come first serve basis. If you do not pre-register for your IDGs, we'll have to assign seating based upon demand and availability.

**Round 1**  
11:20am

**10-Minute  
Transition  
Break**  
12:00pm

**Round 2**  
12:10pm

**Round 1**  
11:20am

**10-Minute  
Transition  
Break**  
12:00pm

**Round 2**  
12:10pm

## 1 IA TECHNOLOGIES TO OPTIMIZE HR PROCESSES

- Employee onboarding
- Payroll, Benefits, Compensation
- Employee experience
- Consumerization of HR

**Albert Rees**, Senior Vice President, Head of Business Consulting, North America, **EPAM Systems**

**Regina Viadro**, Vice President, Co-Head East & Midwest, IA Practice Adviser, **EPAM Systems**

Hosted by: **EPAM Systems**

## 2 WHO'S WHO?: HOW TO DETERMINE YOUR IA SUPPORT PARTNERSHIPS

- How to identify which departments, their Heads & teams that need to be part of your "IA Dream Team" - so to ensure IA success from the gate and thereafter
- What does each player indeed need from you, and/or what does not need to be "shared" info for all

**Leo Dehmer**, Director of Sales, **Kryon Systems**

Hosted by: **Kryon Systems**

## 3 THE EVOLVING WORKFORCE LANDSCAPE

### - HOW AGILITY MUST BE A TOP PRIORITY FOR YOUR IA PROGRAMS

- As technology, corporate cultures, and customer & employee expectations evolve, businesses must keep up – as well as get ahead of the game so to ensure a smooth transition into what will be the workforce realities of the future

**Judith Williams**, Global Workforce Management Leader and Partner, **Mercer**

Hosted by: **ActiveOps**

## 4 HOW MANY BOTS DO WE NEED?

- Identify where, when and how many bots should be deployed into your organization's various departments
- Justify which processes to automate
- Methods to save money and avoid automating inefficiencies

**Ashwin Ashok**, Director, Robotic Process Automation & Technology Leader, **Automation Anywhere**

**Derek Toone**, Vice President, Sales, Americas at Digital Workforce / RPA Leader, **Automation Anywhere Inc.**

Hosted by: **Automation Anywhere**

## 5 STAKEHOLDER & CUSTOMER BUY-IN, ENGAGEMENT & COLLABORATION TO ENSURE IA PROGRAM SUCCESS

- Ensuring effective strategic alliances with various business departments
- Communication and program initiatives that convey their business worth to your IA programs and how they will indeed remain an integral player in your organization

**Rajesh Agarwal**, Senior Vice President & Head – Process Engineering, **Datamatics**

Hosted by: **Datamatics**

## 6 WHAT WE WISH WE KNEW BEFORE OUR IA ROLL OUT

- How to avoid the "could have, would have, should have" post IA roll out blues
- Discussion of lessons learned and what could be done differently if you had a second pass at x project

**Seth Goldberg**, Senior Account Manager, **Softomotive**

Hosted by: **Softomotive**

## 7 RPA JOURNEY: STARTING SMALL & SCALING UP

- Where to start with your RPA journey & best processes to select for first phase automation
- The importance of quick wins & examples
- How to scale RPA within your organization

**Anupam Govil**, President & Partner, **Avasant**

Hosted by: **Avasant**

## 8 CROSS-INDUSTRY AND CROSS-FUNCTIONAL BENEFITS OF INTELLIGENT AUTOMATION

- Which industries & functional departments are best suited for intelligent automation and why?
- What can a variety of industries and functional departments learn from each other in setting up their IA programs?

**Matt Fleckenstein**, Chief Marketing Officer, **Nintex**

Hosted by: **Nintex**

## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

SPONSORS &  
EXHIBITORS

VENUE

PRICING &  
REGISTRATIONRound 1  
11:20am10-Minute  
Transition  
Break  
12:00pmRound 2  
12:10pmRound 1  
11:20am10-Minute  
Transition  
Break  
12:00pmRound 2  
12:10pm

1:00pm

**9 YOUR COE & IT DEPT. "FRICTION": C-3P0 VS. R2-D2**

- How to bridge the "friction" gap between your CoE and IT Departments
- Effective methods to "keep the peace"
- Developing a shared process to achieve your mutually agreed upon IA roll out plans

Pankaj Chowdhry, CEO & Founder, **FortressIQ**Hosted by: **FortressIQ****10 ADDING CONTENT INTELLIGENCE TO YOUR RPA STRATEGY**

- Different phases of RPA, and types of processes content intelligence delivers value
- What can I expect when I add content intelligence to a robotic process
- Understanding where Artificial Intelligence (AI) fits into the RPA journey

Bill Galusha, Director, Product Marketing, **ABBYY**Hosted by: **ABBYY****11 INTELLIGENT AUTOMATION TO DETECT, ANALYZE & REDUCE A VARIETY OF FRAUDULENT ACTIVITY**

- Intelligent automation strategies & technologies that can enhance fraud prevention and detection
- Compliance
- Cybersecurity
- In AP, P2P, and more

Danny Thompson, Senior Vice President, Market and Product Strategy, **APEX Analytix**Hosted by: **APEX Analytix****12 IA VENDOR COMPARISONS & CAPABILITY ANALYSIS**

- Review of the various IA software available now and into the near future
- How x IA software vendors' tools would benefit a wide array of functionally needs, job scope, and budgets
- Compare the Technical Support provided by each vendor/how that may work with your own IA program project needs

Nikhil Hasija, Founder & Chief Product Officer, **Azuqua**Hosted by: **Azuqua****13 WE WENT WITH X IA SOLUTION, NOW HOW DO WE OPERATIONALIZE?**

- How can I quickly and effectively learn to accept the IA software affecting my department and team and make the most of it
- How to develop effective change management initiatives that are in line with your business leaders goals and feasible on an operational and workforce level

Ian Barkin, Co-Founder, Chief Strategy Officer, **Symphony**Hosted by: **Symphony****14 ENSURING IA WORKFORCE DIVERSITY**

- How to source, recruit, and retain a talented and diverse IA workforce
- How to effectively ensure your IA Initiatives offer opportunities to a diverse talent pool
- And much more!

**15 IN-HOUSE CUSTOMIZED IA TECHNOLOGY SOFTWARE DEVELOPMENT & MANAGING YOUR OWN IA INITIATIVES**

- How to determine if you indeed have the workforce you'll require for the job
- IT systems and infrastructures necessary for an in-house IA roll out
- Cost of designing your own IA software versus going with an outside IA vendor

Alex Kazlouski, Senior Director, Workforce Planning & Management, **EPAM Systems**Neeladri Roy, Senior Director, Technology Solutions, **EPAM Systems**Hosted by: **EPAM Systems****FUNCTIONALITY LUNCH CLIQUES & NETWORKING BREAK**

Dig deeper into the matters that interest and concern you most by sitting down for lunch with like-minded executives who work within the same area of functional responsibility as you. While on-site, you will be able to select from the below lunch cliques:

- C-Suite - by invitation only
- F&A
- Human Resources
- Center of Excellence (CoE)
- Contact Centers
- Business Strategy
- Process Improvement
- Operations & Procurement
- General/Non-Specific



## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

2:00pm

5-MINUTE TRANSITION

## MATURITY CURVE TRACKS

Choose from one (1) of the below three (3) tracks.

## PLANNING &amp; LAUNCHING

Chairman: Trey Robinson, Partner,  
ScottMaddenDETERMINING  
IF INTELLIGENT  
AUTOMATION IS INDEED  
RIGHT FOR YOUR  
BUSINESS OPERATIONS

- Discuss the necessary steps to properly evaluate if it's the right time for your business operations to move forward with intelligent automation, based upon scope, budget, stakeholder and staff buy-in, regulations' standards, process transactions' volumes, etc.
- Best timelines for implementation and how to introduce the technologies into your operations

Jasmine Tehara, Vice President,  
Business Optimization, Investment  
Division, Manulife

## EVOLVING

Chairman: Scott Furlong Partner,  
Head of Business Advisory Services,  
Information Services Group (ISG)FIRESIDE CHAT: BEST  
IN CLASS INTELLIGENT  
AUTOMATION CENTERS  
OF EXCELLENCE (CoE)

- How to determine your CoE's customer needs and objectives and developing a CoE to fulfill said business needs
- Best in class change management and communication plans
- Realistic timelines and roadmap to establish and maintain a successful CoE

Mona Kahn, Director of Technology -  
Head of Intelligent Automation, Fannie  
MaeNadia de Vila, Associate Vice President,  
Business Optimization, Investment  
Division, Manulife

## MATURING

Chairman: Dr. Setrag Khoshafian,  
Chief Evangelist & Vice President of  
BPM Technology, PegaHOW TO SUCCESSFULLY  
PLAN & IMPLEMENT AN  
EFFECTIVE ARTIFICIAL  
INTELLIGENCE &  
MACHINE LEARNING  
PROGRAM

- What is an AI/ML program
- What to think about prior to implementing an AI/ ML program
- Once AI/ML is funded what are the next steps
- Things to consider to implement a successful AI program, including social-technical considerations prior to implementing an AI/ML program

Manish Jain, Senior Director, Strategic  
Program Delivery, Royal Bank of  
Canada

## IA EVOLUTIONS LOUNGE

By Invitation Only

POST IA PILOT: IA  
ENTERPRISE STRATEGIES  
& IMPLEMENTATION

- Enterprise strategy, scalability, evolution, and sustainability
- Technical and logistical roadmap to the next steps of advance IA programs, on multi-location, and/or enterprise-level
- Integrating legacy with IA technologies and how to maximize ROI
- Engaging IT & Auditors
- Examine Waterfall & Agile IA program initiatives and environments
- Pacing Bot productivity increase to match attrition
- Managing a Digital Workforce

John Cottongim, CFA, Automation  
Director, MarsJeff Machols, Vice President, Head of  
Continuous Improvement Center, Voya  
FinancialModerator: Barry Mitchell, Global  
Offering Leader, IBM Automation

Hosted by: IBM

2:05pm

## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

SPONSORS &  
EXHIBITORS

VENUE

PRICING &  
REGISTRATION

2:45pm

## 5-MINUTE TRANSITION BREAK

PLANNING &  
LAUNCHING*Chairman: Trey Robinson, Partner,  
ScottMadden***CASE STUDY: BIG TROUBLE IN LITTLE PROCESSES: STRATEGIES FOR AUTOMATING YOUR LESS STANDARDIZED AND SMALLER VOLUME PROCESSES**

The easy case for automation is when your process is highly standardized and has a high volume of transactions (and people) involved. But what do you do when a process has not been standardized, is lower volume, or both? Some might argue for standardizing first and automating later. Others might suggest that these are just bad candidates for automation. But actually MOST work done across the enterprise is non-standard and low volume so to get the greatest benefit from automation, companies will have to learn how to automate beyond the highly standard and high volume processes. This session will provide practical advice including a customer case study on how to be successful using automation even in ad-hoc and adaptive process areas within your business.

**Max Cheprasov**, Chief Automation Officer, **Dentsu Aegis Network, USA**

Moderator: **Ted Shelton**, Chief Customer Officer, **Catalytic, Inc.**

## EVOLVING

*Chairman: Scott Furlong Partner,  
Head of Business Advisory Services,  
Information Services Group (ISG)***FIRESIDE CHAT: OBTAIN POWERFUL DATA ANALYTICS THROUGH IA TECHNOLOGIES AND BOOST YOUR BUSINESS INTELLIGENCE**

The process of obtaining clear-cut data analytics that can be thoroughly analyzed to guide your organization toward continued process improvement and enhanced customer delivery is top of mind for a variety of executives who work within the corporate strategy, finance, operations, HR, and customer delivery departments. That's where intelligent automation technologies come into play. By utilizing these technologies, not only can you optimize your back-office and customer-facing transactional processes, and enhance your customer delivery, but you'll also be able to harness powerful data analytics that will add great value to a wide variety of departments within your organization.

In this session, we will explore:

How AI and cognitive technologies can be programmed into your IT infrastructure to provide powerful data analytics that relate to: customer buying trends, policyholder claims' history, patient medical profiling, financial and sales reporting, red flags that alert you of fraudulent activities, best case scenarios with respect to procurement, contracting, supply chain management, logistics' business decisions, and much more

**Tyler Bent**, Global Finance Program Leader, **AIG**

**Vartul Mittal**, Former Business Process Transformation Specialist, Assistant Vice President - Continuous Improvement, **LEAN & RPA, Barclays**

## MATURING

*Chairman: Dr. Setrag Khoshafian, Chief Evangelist & Vice President of BPM Technology, Pega***CASE STUDY: UNLOCKING THE TRUE VALUE OF AUTOMATION**

The need of the hour is to adopt newer technologies like automation and AI to get a competitive edge. While automation enables organizations to automate repetitive tasks and gain efficiency, AI helps derive insights from the data generated to enhance decision making. The journey for an organization begins from automation and leads to AI implementation to make them successful.

Automation journey starts with deterministic automation, focusses on saving time and effort by utilizing robots to automate repetitive and rule-based business processes. As the starting point in the automation continuum, Robotic Process Automation (RPA) capabilities identify inefficiencies and automate a part or the whole process with bots. Going beyond RPA deployment, when a business starts analyzing data to make future predictions, it's considered to be in the predictive phase.

Building and managing this repository of knowledge over time to derive evolved patterns and aid business decisions, propels an enterprise towards the cognitive phase of automation, this is done through Artificial Intelligence.

**Chris Gilmore**, PMP, Application Technology Leader, **Aetna**

Moderator: **Atul Soneja**, Head of Business Development, **EdgeVerve (an Infosys company)**

Hosted by: **EdgeVerve (an Infosys company)**

IA EVOLUTIONS  
LOUNGE*By Invitation Only***INTELLIGENT AUTOMATION \$\$ & CENTS: DETERMINING BOT SCALING UP COSTS & ROI**

- The nitty gritty costs associated with a variety of Enterprise IA programs
- Which business models would reap the greatest ROI
- Scaling up - hype or a sound business decision?
- Planning for your future IA investments

**Mona Kahn**, Director of Technology - Head of Intelligent Automation, **Fannie Mae**

**Joe Hassenplug**, Senior Automation Engineer, **FSI, Office Depot, Inc.**

Moderator: **Michael Gilfix**, Vice President, Digital Business Automation, **IBM Hybrid Cloud**

Hosted by: **IBM**

2:50pm



## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

3:30pm

## 5-MINUTE TRANSITION BREAK

3:35pm

**FIRESIDE CHAT: FROM A BOT TO A COE: NASA SHARED SERVICES CENTER (NSSC) LESSONS LEARNED**

The NASA Shared Services Center (NSSC) deployed the first RPA bot in the Federal government in May of 2017. It has been a little over a year and the NSSC has started to make the shift from bot building to sustainment and scalability. The Intelligent Automation Services office led by Pam Wolfe has been experimenting with the right government model, day to day operations, relationship building with the CIO and IT, process selection, service offering and a myriad of other issues. Spend this session listening and learning what worked and what presented challenges. Pam will discuss her plans, challenges and course corrections in the NSSC's journey to establish the first operational Center of Excellence in the government.

**Pam Wolfe**, *Division Chief, NASA*

Moderator: **James Walker**, *Public Sector Marketing Manager, UiPath*

Hosted by: **UiPath**

4:15pm

**AFTERNOON NETWORKING BREAK & DEMO DRIVE CONTINUED**

Grab your Demo Drive Cards & head to the Expo Hall to get those final signatures you need to enter our Demo Drive Raffle tomorrow!



## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

## IA WORKFORCE MANAGEMENT TRACKS

Choose from one (1) of the below three (3) tracks.

## RECRUIT IA TOP TALENT

Chairman: Trey Robinson, Partner,  
ScottMadden

## HOW TO RECRUIT TOP IA TALENT

You can have the Cadillac of IA technologies, yet without top IA talent to manage, and/or utilize said technologies, you might as well "Hit the road, Jack!"

In this session, we will:

- Examine how to identify & recruit top IA talent
- How to stay competitive with recruiting and retaining top IA talent considering the fierce market demand of high-salaries
- Benefits of IA Internships
- Pros & cons of freelance and permalance IA teams – and how to best manage these types of working relationships
- Working with IT Recruiters

AJ Bernstein, Senior Director, Financial Shared Services, **LinkedIn**

## IA TOP TALENT TRANSITIONAL PHASE

Chairman: Scott Furlong Partner,  
Head of Business Advisory Services,  
Information Services Group (ISG)PANEL DISCUSSION:  
MAKING SENSE OF  
A NEW IA WORK  
ENVIRONMENT

Working with new technologies is never easy. That said, it's important to empower your workforce utilizing IA technologies in their day-to-day activities, and by proving the tools and training they need to be successful. In this session, we will explore:

- Training programs that meet the needs of your diverse staff utilizing your IA technologies as part of your overall IA program roll out
- And much more!

Douglas Ausnehmer, Director, Supplier Management Office, **Abbott**

Moderator: Mark Davison, Global Partner, Robotic Process Automation & Cognitive, **Information Services Group (ISG)**

Hosted by: **ISG (Information Service Group)**

## RETRAIN &amp; RETAIN IA TOP TALENT

Chairman: Dr. Setrag Khoshafian,  
Chief Evangelist & Vice President of  
BPM Technology, PegaNOW THAT YOU HAVE  
THEM, HOW DO YOU  
KEEP THEM?

To keep top IA talent, who are in great market demand, you must offer them an attractive career path, and/or perks that prevent them from "jumping ship" every time they are teased by your competitors to join their organization. And/or....the same can be said for creating a positive IA work environment for your NON-IA staff, those who are working with the IA technologies in their day-to-day back office job roles.

In this session, we will discuss:

- How to build new, and/or revised career paths for your employees utilizing IA technologies within their job roles
- Re-training programs and roadmaps
- What the market is offering as "attractive" IA staff compensation/retention packages (perks, pay-scale, incentive programs, etc.)

Curt Burghardt, Vice President, HR Shared Services & HR Systems, **Walgreens**

## IA EVOLUTIONS LOUNGE

By Invitation Only

IA TEAM COLLABORATION:  
ENSURING TRANSPARENT,  
EFFECTIVE & PRODUCTIVE  
IA OPERATIONS ACROSS  
VARIOUS IA TEAMS &  
GLOBAL OPERATIONS

- Global IA Heads – Who are they, how should they work together, and who owns what?
- Effective collaboration between IT & the business side of IA
- Is automation an IT asset or a virtual workforce?
- "HR" for the digital workforce
- Structuring Global Centers of Excellences as per x country initiatives, strengths, limitations, and cultural/language differences

Samir Bagri, Director, Global Business Services, **Aptiv**

Jeff Kudrle, Director, Innovation – Data Strategy, Governance & Process Excellence, **The Coca-Cola Company**

Moderator: Gene Chao, Vice President & General Manager, **IBM Automation**

Hosted by: **IBM**

## 5-MINUTE TRANSITION BREAK

5:15pm

5:55pm



## MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

## FUNCTIONAL TRACKS

Choose from one (1) of the below three (3) tracks.

## SHARED SERVICES

Chairman: Trey Robinson, Partner,  
ScottMaddenPANEL DISCUSSION: IA  
FOR MIDCAP SSCs

For smaller businesses, it can be harder to show a significant ROI on an intelligent automation journey, and it can feel overwhelming when you don't know where to start!

In this session, we will examine::

- Tools and technologies which are not scale dependent, and can be used in smaller test/prototype/ proof of concept scenarios
- Is it all about numbers
- Can IA work for smaller processes and quantities
- How can you make the business case work for your mid-cap organization
- Using automation to find ways to add value, and maintain employee engagement through the transition

**Lori Bondar**, Vice President, Controller & Chief Accounting Office, **Avery Dennison**

**Tamera Smith**, Manager, Digital Innovation Support & Compliance, Smart Process Automation & Robotics Center, **Fannie Mae**

## IT

Chairman: Scott Furlong Partner,  
Head of Business Advisory Services,  
Information Services Group (ISG)WHEN TO KILL A BOT &  
WHY WOULD YOU?

Imagine this scenario. One day after many successes in your IA journey something goes wrong either on an infrastructure-level or your stakeholders decide to either nix or expand your IA programs, leaving you with a kill or not to kill bot situation. If and when that happens, then what? How can you kill your bot program and either start from scratch, totally nix all signs of an IA program, or better yet, upgrade to a better bot program because it is necessary to do so for expansion reasons.

**Josh Remacle**, Digital Workforce Leader,  
**Koch Business Solutions (KBS)**

## CONTACT CENTERS

Chairman: Dr. Setrag Khoshafian,  
Chief Evangelist & Vice President of  
BPM Technology, PegaMAIL ORDER BOTS - HOW  
TO FIND YOUR BOT SOUL  
MATE

The manner in which potential call center bots communicate with their customers is very important to customer delivery, branding, and regulations. In today's AI & cognitive marketplace, there are many options to choose from, including bots that interact with their callers based upon their emotional responses, and audio tones & pitches. With so many options available, how do you know for sure which bot is indeed marriage material for your call center?

In this session, we will discuss:

- How to determine what style of bot would be best for your call center
- Beyond your potential bots personality, what else do you require from them through process automation and data analytics
- Pros & cons, costs, and operational/infrastructure requirements associated with a variety of bot types

## IA EVOLUTIONS LOUNGE

By Invitation Only

FUNCTIONAL IA  
PART I: OPTIMIZING  
FUNCTIONAL  
PROCESSES BY  
UTILIZING INTELLIGENT  
AUTOMATION

How to harness the power of AI, RPA, process automation, and advanced analytics to yield higher quality at a lower cost and risk within your multi-location, and/or global Sourcing & Procurement, Customer Service, and Finance & Administration operations.

In this session, topics will include:

- Evaluate business process workflow & redesign
- Determine which automation technologies are right for the job/s at hand, on small and big picture-level – including scaling up
- PoCs for AI, cognitive, and other advance IA technologies
- Centers of Excellence structure & areas of responsibility
- Governance models, practices, and policies
- AI data analytics

6:00pm

# MAIN CONFERENCE: DAY ONE

TUESDAY, JULY 31, 2018

## Session Continued

Henry Lyles, Director, Global Business Services Data Excellence & Automation, **McDonald's Corporation**

Moderator: Barbara Hodge, Global Online & Digital Content Editor, **SSON**

## Session Continued

## Session Continued

## Session Continued

Delphine Bernard, Global Head of Finance Operations, **Uber**

Anil Bhavnani, Director – BPO Operations, Global Financial Solutions - Shared Services, GFS office in India, **Pfizer, Inc.**

Jay Desai, Senior Director Head, Outsourcing Strategy & Governance – CoE, **AbbVie, Inc.**

Moderator: Gene Chao, Vice President & General Manager, **IBM Automation**

Hosted by: **IBM**

KEYNOTE & SPEAKERS

EXPERIENCES

AGENDA

SPONSORS & EXHIBITORS

VENUE

PRICING & REGISTRATION

6:30pm

CLOSE OF MAIN CONFERENCE DAY ONE

6:35pm

NETWORKING COCKTAIL PARTY



## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

8:00am REGISTRATION FOR MAIN CONFERENCE DAY TWO &amp; NETWORKING BREAKFAST

8:50am CHAIRMAN'S DAY ONE RECAP &amp; DAY TWO OPENING REMARKS

Todd Lohr, *Principal, Technology Enabled Transformation*, **KPMG**

9:00am FIRESIDE CHAT: CREATING A DIGITAL WORKFORCE IN SHARED SERVICES – LEVERAGING RPA, COGNITIVE &amp; ANALYTICS

As intelligent automation continues to expand, practitioners are recognizing the importance of promoting a healthy culture of innovation. Opening up the creative potential of your team by using augmenting technologies can improve engagement and work satisfaction while increasing adoption rates. Develop a strategy that expands your RPA usage and gives your coworkers an opportunity to participate as change agents.

Amory Booher, *Senior Vice President - Model, Vendor, and Retail Underwriting Systems Architecture*, **BBVA Compass**Ashwin Ashok, *Director, Robotic Process Automation & Technology Leader*, **Automation Anywhere**Hosted by: **Automation Anywhere**

9:40am PANEL DISCUSSION: WHERE ARE WE WITH RPA?

During the last 3 years, RPA has emerged as one of the leading technologies in the market for the automation of business processes within organizations of all industries and sizes. According to a 2017 Forrester Study, 45% of organizations had implemented varying types of RPA solutions, and 49% of organizations were planning to implement these solutions over the next three years. While there are many reports out there showing the percentage of companies that are leveraging RPA, the studies are very high level and don't provide much operational insights on how RPA is truly being used, and the specific benefits that organizations have been able to achieve. Auxis recently conducted an RPA survey report to over 100 organizations of different industries and sizes, and will be unveiling the key insights of the study as part of the overall session. Topics of discussion will include, yet will not be limited to:

- What are the "real" benefits that I can expect to attain through RPA?
- What are the main challenges faced by companies who have implemented RPA?
- What deployment model are companies using? In-house vs. hybrid

Richard Mackey, *Senior Vice President, Information Technology*, **Intalere**Angel Lopez, *Global Operational Controller*, **The AES Corporation**Juan Esteban Solano, *GBS IT Service Operation, Americas*, **Bacardi**Moderator: Eric Liebross, *Senior Managing Director, Operations*, **Auxis**Hosted by: **Auxis**



## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

10:20am MORNING NETWORKING BREAK &amp; DEMO DRIVE RAFFLE PRIZE WINNERS ANNOUNCED

## 11:00am CASE STUDY: DESKTOP AUTOMATION – YOUR EMPLOYEES' PERSONAL ASSISTANT AND BEST FRIEND

Asurion is a long time user of the NICE process automation and desktop guidance solutions. Their center of excellence supports their business units with new and valuable automation solutions on a daily basis. Join this session to understand why every organization needs to complement RPA with Desktop Automation as a driver of quality service, increased productivity, and happier employees.

**Joseph Magliacano**, Robotic Process Automation Analyst, **Asurion**

Moderator: **Lonnie Johnston**, Vice President of Sales, **NICE**

Hosted by: **NICE**

## 11:40am PANEL DISCUSSION: ARTIFICIAL INTELLIGENCE TO ENHANCE CUSTOMER ENGAGEMENT &amp; DELIVERY

Let's be honest, you simply don't know your customers as well as you want to. You may have tried to wire together customer databases and sprinkled some reporting on top. You may have even attempted to analyze some customer data and discern a few interesting nuggets of insight. But trying to keep up with the always connected customers all the time on all channels – let alone understanding what's going to drive that next positive interaction and acting on it – is really difficult.

In this session, we will explore how AI is redefining customer engagement, driving operational excellence, and fueling business agility. Topics of discussion will include, yet will not be limited to:

- How utilizing AI (artificial intelligence) can free your workforce from daunting repetitive tasks so they can spend more time on higher-value work, and in turn, focus on enhancing their customer engagement and delivery
- Powerful data analytics that provide a wealth of information regarding your customer base – delivering enhanced business intelligence for your organization
- AI software options and capabilities analysis

**Manish Jain**, Senior Director, Strategic, Program Delivery, **Royal Bank of Canada**

**Karen Cheung**, Senior Manager - Digital Labor (RPA/RDA), Work & Performance Management, **Southern California Edison**

Moderator: **Ying Chen**, Head of Product Marketing, Platform Technologies, **Pega Systems**

Hosted by: **Pega**

## 12:20pm 5-MINUTE TRANSITION BREAK

## 12:25pm INDUSTRY SECTORS' LUNCH CLIQUES &amp; NETWORKING BREAK

Dig deeper into the matters that interest and concern you most by sitting down for lunch with like-minded executives who work within the same industry sector as you.

While on-site, you will be able to select from the below lunch cliques:

- |                 |                              |                              |              |
|-----------------|------------------------------|------------------------------|--------------|
| ▪ BFSI          | ▪ Shared Services            | ▪ Hospitality                | ▪ Government |
| ▪ Manufacturing | ▪ Transportation & Logistics | ▪ Healthcare & Life Sciences | ▪ Others     |

## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

## FUNCTIONAL TRACKS

Choose from one (1) of the below three (3) tracks.

## SHARED SERVICES

Chairman: Brad DeMent, Partner  
& Leader of Finance Practice,  
ScottMadden

### CASE STUDY: HOW IA CAN BE A REVENUE GENERATOR IN ADDITION TO IMPROVING EFFICIENCIES

Efficiencies and effectiveness are key KPI's for all organizations – the combination of RPA and AI-powered cognitive automation is a proven way to significantly improve them. In this session, take a look at how one organization developed a model and a dashboard to weight both revenue generation and cost efficiencies equally and how that model resulted in increased demand of the Intelligent Automation CoE services and significant in year return on investment.

**Cari Covent**, Vice President, Intelligent Automation, **Canadian Tire Corporation**

## IT

Chairman: Mark Davison, Global Partner, Robotic Process Automation & Cognitive, Information Services Group (ISG)

### PANEL DISCUSSION: WHEN YOUR BOTS GET SICK - HOW TO MANAGE PROGRAM DELIVERY EXPECTATIONS & GET OUT OF THE WEEDS

Although IA technologies are designed to work 365, 24/7, they took can get sick and need of some well-earned R&R or a heavy dose of technical Rx care.

In this session, we will discuss:

- Various bot illnesses and how to remedy x bot ailment
- Efficient methods to diagnose a variety of bot technological problems
- How to effectively communicate with your various stakeholders the tech problem at hand and what's involved to get x situation fixed and the realistic timeline to do so

**Alicia Musgrove**, Director, HR Shared Services, **Walgreens**

**Jeff Kudrle**, Director, Innovation - Data Strategy, Governance & Process Excellence, **The Coca-Cola Company**

**Sameer Naik**, Lead SAP Systems Engineer, **ConAgra Foods**

Moderator: Edward Brooks, Founder, **The RPA Academy**

## CONTACT CENTERS

Chairman: Dr. Setrag Khoshafian, Chief Evangelist & Vice President of BPM Technology, Pega

### MODERNIZE YOUR PHONE SYSTEM WITH INTELLIGENT AUTOMATION

After dialing a company's 1-800 number, customers are typically met with an automated phone (IVR) system they despise. Common customer complaints are "it doesn't understand me", "it can't help me with my problem" or "I just want to speak to a real person". Given the exorbitant price of a live agent phone call, it is critical to maximize your IVR's intelligent automation capabilities to minimize costs and deliver an excellent customer experience.

In this session, we will discuss strategies to:

- Implement enhanced self-service functionality to automate complicated call types resulting in lower agent costs and higher customer satisfaction.
- Utilize relevant information to accurately predict the reason of the customer's call resulting in a streamlined and personalized experience.
- Expedite digital transformation by seamlessly transitioning customers from the IVR to digital channels.
- Choose the right KPIs to properly measure IVR health and identify customer pain points

**Jamel Jones**, Director, IVR Operations, **Comcast Cable**

## IA EVOLUTIONS LOUNGE

By Invitation Only

### FUNCTIONAL IA PART II: OPTIMIZING FUNCTIONAL PROCESSES BY UTILIZING INTELLIGENT AUTOMATION

How to harness the power of AI, RPA, process automation, and advanced analytics to yield higher quality at a lower cost and risk within your multi-location, and/or global HR, Supply Chain, and Marketing operations.

In this session, we will discuss:

- Evaluate business process workflow & redesign
- Determine which automation technologies are right for the job/s at hand, on small and big picture-level – including scaling up
- PoCs for AI, cognitive, and other advance IA technologies
- Centers of Excellence structure & areas of responsibility
- Governance models, practices, and policies
- AI data analytics

**Nadia de Vila**, Assistant Vice President, Business Optimization, Investment Division, **Manulife**

**Vartul Mittal**, Former Business Process Transformation Specialist, Assistant Vice President - Continuous Improvement, LEAN & RPA, **Barclays**

Moderator: **Michael Gilfix**, Vice President, Digital Business Automation, **IBM Hybrid Cloud**

Hosted by: **IBM**

1:25pm

## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

2:05pm

5-MINUTE TRANSITION BREAK

## MATURITY CURVE TRACKS

Choose from one (1) of the below three (3) tracks.

## PLANNING &amp; LAUNCHING

Chairman: Brad DeMent, Partner  
& Leader of Finance Practice,  
ScottMadden

### CASE STUDY: HOW LINKEDIN HARNESSSED THE POWER OF COLLECTIVE INTELLIGENCE TO MOBILIZE THEIR RPA STRATEGY

Somebody always knows more than you! Open up innovation and leverage the wisdom of the crowd to deliver a successful RPA strategy.

In this session, we will:

- Examine how to communicate at scale, get the message directly to everyone
- The benefits of crowd sourcing ideas and opening innovation
- How pre-evaluating ideas at the start increases the chance of a successful RPA program
- Expand your RPA market strategy – identify opportunities for growth

Joanne Griffin, FCA , EMEA Controller & Global Lead - Quality Insights, **LinkedIn**

Kamal Chin, Senior Program Management Lead, Intelligent Automation, Finance Shared Services, **LinkedIn**

## EVOLVING

Chairman: Mark Davison, Global Partner, Robotic Process Automation & Cognitive, Information Services Group (ISG)

### CASE STUDY: FROM AUTONOMOUS CARS TO ROBOTIC PROCESS AUTOMATION: INNOVATING FRONT TO BACK WITH APTIV

As a pioneer of autonomous technology, Aptiv is well known for its product innovation (pioneers that drove from San Francisco to New York City in an autonomous vehicle). Now they are applying innovation and implementing automation in their administrative functions!

In this session their GBS leader talks about:

- Are RPA benefits real?
- Can Bots and humans work together?
- How to scale up your RPA implementation?
- How to leapfrog in (if you are not an early adopter)?

Samir Bagri, Director, Global Business Services, **Aptiv**

## MATURING

Chairman: Dr. Setrag Khoshafian, Chief Evangelist & Vice President of BPM Technology, Pega

### NOW & ON THE SOON TO COME BUSINESS REALITY HORIZON: HOW THE IOT (INTERNET OF THINGS) IS & WILL BE SUPER-CHARGING DATA ANALYTICS FOR ENHANCED BUSINESS INTELLIGENCE

Topics of discussion will include, yet will not be limited to:

- Enhanced customer delivery and business intelligence via the IoT (Internet of Things) and the powerful data analytics they provide
  - Examination of a variety of IoT technologies and their capabilities, costs, and implementation requirements
  - Various uses of IoT technologies and within a variety of functional disciplines
  - Regulations' compliance
- Ryan Davis, Senior Vice President, Procurement Management, **Bank of America**

## IA EVOLUTIONS LOUNGE

By Invitation Only

### IA DATA SECURITY: BEST PRACTICES TO ENSURE DATA INTEGRITY & SECURITY

How to ensure your customer and employee data is secure

- Locking in system weakness
- Regression testing
- Best practice authentication

Sameer Naik, Lead SAP Systems Engineer, **ConAgra Foods**

Moderator: Gene Chao, Vice President & General Manager, **IBM Automation**

Hosted by: **IBM**

2:10pm



## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

KEYNOTE &  
SPEAKERS

EXPERIENCES

AGENDA

SPONSORS &  
EXHIBITORS

VENUE

PRICING &  
REGISTRATION

2:50pm

## 5-MINUTE TRANSITION BREAK

## PLANNING &amp; LAUNCHING

Chairman: Brad DeMent, Partner  
& Leader of Finance Practice,  
ScottMadden

### CASE STUDY: DEVELOPING A FRAMEWORK TO INDUSTRIALIZE & TRACK YOUR ENTERPRISE AUTOMATION PROGRAM

RPA has been significantly reducing cost and driving efficiency for enterprises. However, they face a few challenges while scaling RPA, like

- Absence of a framework to measure RPA program's success
- Managing RPA roadmap to be productive and efficient
- Incorrect process identification for RPA
- Poor Infrastructure and security

And to address these issues enterprises require a framework which focuses on measuring financial impact, customer impact, enterprise program management and people & change.

**Hector Chahin**, Director Employee Experience and Analytics, PMO-Human Resources, **United Airlines**

Moderator: **Avnish Singh**, Assistant Vice President, Head of Business Applications, **EdgeVerve (an Infosys company)**

Hosted by: **EdgeVerve (an Infosys company)**

## EVOLVING

Chairman: Mark Davison, Global Partner, Robotic Process Automation & Cognitive, Information Services Group (ISG)

### ROUNDTABLE DISCUSSION: IA MULTI- VENDOR SOURCING & TECHNOLOGICAL INTEGRATION

As your IA program evolves, your need to utilize various IA software and consultant services may increase, and usually do.

However, sizing up and managing a variety of IA solution providers can be quite a daunting task, especially on a technical-level.

In this session, we will discuss:

- Questions that must be ask of potential IA solution providers when you need to do x with your IA programs
- Examine of which IA software programs are compatible with each other and if a multi-vendor integration scenario is indeed right for your IA program on a workforces, scope, and budgetary-level
- How to effectively coordinate an IA program utilizing multiple vendors

**Anil Bhavnani**, Director – BPO Operations, Global Financial Solutions - Shared Services, GFS office in India, **Pfizer, Inc**

**Jay Desai**, Senior Director Head, Outsourcing Strategy & Governance – CoE, **AbbVie, Inc.**

## MATURING

Chairman: Dr. Setrag Khoshafian, Chief Evangelist & Vice President of BPM Technology, Pega

### FIRESIDE CHAT: RPA & COGNITIVE HYBRID MODELS – EXAMINE THE OPPORTUNITIES & FEASIBILITY

- How to scale up your IA program to utilize RPA and cognitive technologies in conjunction with each other and obtain maximum benefit by doing so
- Examine infrastructure requirements and which tasks are best suited for a hybrid IA program
- Powerful business insights that can be derived from real-time analytics with a RPA/cognitive hybrid

**John Cottongim**, CFA, Automation Director, **Mars**

**Manish Jain**, Senior Director, Strategic, Program Delivery, **Royal Bank of Canada**

Moderator: **Gene Chao**, Vice President & General Manager, **IBM Automation**

Hosted by: **IBM Automation**

## IA EVOLUTIONS LOUNGE

By Invitation Only

### BEYOND THE BOT: DISCUSSING THE WHYS AND HOWS OF MAXIMIZING THE VALUE OF RPA

- Best practices for deploying RPA as part of an IA program
- How the utility of RPA increases by pairing it with other automation technologies such as BPM, decision management, data capture, and content management

**Jasmine Tehara**, Vice President, Business Optimization, Investment Division, **Manulife**

**Shafi Yusuf**, Senior Vice President, Head of Reengineering Transformation & Digitization and Robotics Automation, **Bank of the West**

Moderator: **Michael Gilfix**, Vice President, Digital Business Automation, **IBM Hybrid Cloud**

Hosted by: **IBM**

2:55pm

## MAIN CONFERENCE: DAY TWO

WEDNESDAY, AUGUST 1, 2018

3:35pm

## AFTERNOON NETWORKING BREAK

3:50pm

## CASE STUDY: PROCESS MINING IN MERCK'S AUTOMATION JOURNEY

Steve Carpenter, Executive Director, Global Business Services Technology at Merck & Co will discuss their automation journey utilizing process mining as a first step on the path to Automation. Leveraging the transparency process mining offers, Merck is analyzing their process landscape to help build more complete bots and change the mix of skills in their Shared Services Centers. Through the lenses of the Order-to-Cash and Purchase-to-Pay, Steve will show how processes mining is enabling these processes to be faster, smarter and more efficient.

Steve Carpenter, *Executive Director, Global Business Services Technology*, **Merck & Co**

Hosted by: **Celonis**

4:30pm

## PANEL DISCUSSION: OVERCOMING THE OBSTACLES OF RPA &amp; OCR SYSTEMS' INTEGRATION

Although the BFSI (banking, financial services & insurance) industries have been the leading early adopters of RPA due to their need to increase transactional productivity, transparency, and accuracy, the industry has nevertheless experience a few glitches along the way with respect to RPA and OCR integration. However, fear not, as it is indeed possible to have an RPA program work in harmony with your internal or external OCR systems!

In the session, our panelist will reveal:

- Tools, systems, and methods they've found to be the most effective with RPA and OCR integration

Shafi Yusuf, *Senior Vice President, Head of Reengineering Transformation & Digitization and Robotics Automation*, **Bank of the West**

Jon Theuerkauf, *Advisor, The Improve and Innovate Company & Former Managing Director/Group Head of Performance Excellence*, **BNY Mellon**

Jeff Machols, *Vice President, Head of Continuous Improvement Center*, **Voya Financial**

Hosted by: **HyperScience**

5:10pm

## PANEL DISCUSSION: INTELLIGENT AUTOMATION TO ENHANCE FINANCIAL ACCURACY, TRANSPARENCY &amp; PRODUCTIVITY

The banking, financial services & insurance (BFSI) industries were some of the first early adopters of IA technology. They continue to lead the path in utilizing intelligent automation as a powerful tool to achieve process optimization. As your IA program evolves, learn how the BFSI industries were successful with their IA efforts, and continue to be so – and how you may be able to mimic some of the practices they put in place to help you skip a step or two.

Mini Suri, *Senior Vice President*, **Citi**

Delphine Bernard, *Global Head of Finance Operations*, **Uber**

Joe Hassenplug, *Senior Automation Engineer, FSI*, **Office Depot, Inc.**

Moderator: Rochelle A. Hood, *PMP, Global Head of Customer Analytics and Research*, **SSON**

5:50pm

## CLOSE OF MAIN CONFERENCE DAY TWO

See you tomorrow at our exciting "Build a Bot" Programmers' Focus Day! Don't forget your laptops!

# UIPATH WORKSHOP DAY

THURSDAY, AUGUST 2, 2018

8:00am REGISTRATION FOR THE UIPATH WORKSHOP DAY & NETWORKING BREAKFAST

9:00am **UIPATH WORKSHOP: HOW TO SUCCESSFULLY UTILIZE THE UIPATH PLATFORM**

Join your fellow IA tech community for this 3-hour interactive demonstrative session focused on how to best utilized UiPath's platform for a wide variety of functional purposes. Topics of discussion, analysis, and on-site problem solving tasks will include, yet will not be limited to: Nuts & bolts of how to best use UiPath's platform, exploring any tech problems that may confuse and the instructions and solutions to x.

Hosted by: **UiPath**

10:45am **MORNING NETWORKING BREAK**

11:15am **UIPATH WORKSHOP CONTINUES**

12:45pm **END OF THE UIPATH WORKSHOP**

1:00pm **GRAB & GO AND WORKING LUNCH BREAK**

1:45pm **TOWN HALL: HOW TO SUCCESSFULLY IMPLEMENT IA PLATFORMS**

In this final yet very important session, we will look back on what we've learned on our last day of the Intelligent Automation Week – Chicago 2018 conference, discussing the Top Dos and Don'ts of how to successfully implement IA platforms, with a hands on, in the trenches perspective to such.

Edward Brooks, *Founder*, **The RPA Academy**

Hosted by: **The RPA Academy**

2:30pm **END OF UIPATH WORKSHOP DAY - SEE YOU NEXT YEAR!**



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KEYNOTE &  
SPEAKERS

EXPERIENCES

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VENUE

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REGISTRATION

# SPONSORSHIP OPPORTUNITIES

## Networking

Ensure that you have the opportunity to engage with the key decision makers within your industry. We can create a platform for you to effectively interact with your top customers and prospects in the environment of your choice. This can range from formalized private meetings / workshops right through to less structured networking events such as sponsored drinks receptions, coffee breaks or lunches. Ultimately whatever you decide is the right forum; we will support you in your quest to advance relationships with the key people who can influence the future of your business.

## Branding

Your company can be elevated to a position where they are seen as a market leader. In a fiercely competitive market you need to ensure that your brand is differentiated from the competition. Failure to create a clear identity will see your organization fade into the background. We ensure that we do everything we can to effectively lift your brand before, during and after the event. Not only do we create a fully integrated marketing campaign, which your company can be part of, but we also offer high impact premium branding opportunities for example on bags, water bottles, pens lanyards etc.

## Thought Leadership

If you think that you should be viewed as a true industry leader then your need to demonstrate your market knowledge and expertise through a thought leadership opportunity, such as speaking or chairing. This is a highly unique opportunity for your company to educate the market, and as long as you are credible enough to fit into a high level event program, we can position your organization alongside top customers and prospects in our speaker faculty. As part of this speaker faculty your company will be set apart from other industry attendees giving you the competitive edge required to make further strides in the market.



To learn more about the opportunities available contact:

Chris Ritchie

T: 212-885-2799

E: [Chris.Ritchie@iqpc.com](mailto:Chris.Ritchie@iqpc.com)

# SEE YOU IN CHICAGO

## VENUE

### **Chicago Marriott Downtown Magnificent Mile**

540 N Michigan Avenue,  
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Phone: (312) 836-0100

A Group Discount Rate has been established for all our IA attendees. The rate is \$259.00 per night. To secure this special offer, simply call (312) 836-0100 and give them the group name of "Intelligent Automation Summit". Additional booking information soon to come!

Treat yourself to a world-class destination experience at the Chicago Marriott Downtown Magnificent Mile hotel. This Michigan Avenue hotel features newly renovated rooms with many with breathtaking city, skyline and lake views. The trendy on-site eateries, Harvest Restaurant and Rush Street Pantry, use local ingredients to create delicious, made-from-scratch American cuisine. Stop by futuristic Rush Street Bar and Lounge for cocktails or wine. Let this downtown Chicago hotel be your starting point for adventure, with high-end shopping, Navy Pier, Millennium Park and more just a walk away.

## SITES & ATTRACTIONS

### **MILLENNIUM PARK**

With 25 acres of awe-inspiring landscape, breathtaking architecture and an iconic collection of public art, Millennium Park is Chicago's premier green space. "The Bean", Chicago's signature landmark in its mirror-like surface will allow you to see not only your own reflection but the downtown skyline.

### **NAVY PIER**

Navy Pier is a bustling 1.5 mile-long boardwalk filled with restaurants, shops, and plenty of activities to fill your day.

### **360 CHICAGO**

If you're looking for one of the best views of Chicago, a visit to 360 CHICAGO is a must. In fact, Travel + Leisure magazine named it one of the Best Views in America. Located high above The Magnificent Mile, 360 CHICAGO is an observation deck nestled on the 94th floor of the John Hancock Center, the fourth-tallest building in the city recognized for the distinctive X-shaped external bracing that has made it a Chicago architecture icon.

### **SKYDECK CHICAGO**

Dare to stand out on the 103rd floor, with never before seen views. The 1,353 feet straight down, with a glass boxes extending 4.3 feet out from the Skydeck, providing never before seen views of Chicago. Enjoy 360 degree views spanning up to 50 miles and 4 states.



# IA EVENT APP



Download the mobile app to create your personalized conference schedule, stay current on any program scheduling changes, learn more about the exhibitors, schedule meetings with industry peers, and to share your experience live.

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- Attend with your team to maximize your experience: share notes, plan meetups, and more with just a few swipes

#### Here's How to Download It:

- Search for 'SSON Events' in your app store
- Create a profile & sign up
- Complete your profile & hit 'join'
- Click on 'Intelligent Automation' event and join the fun!

# LET'S GET SOCIAL!

STAY UP TO DATE WITH INTELLIGENT  
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Use our hashtag **#IAWEEK** and get the  
chance to be entered into an on-site raffle!

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## PRIMARY

PACKAGE	ONSITE
Silver: Main Conference Only (2 days)	\$2,399
Gold: Main Conference Pass, 4 Workshops	\$3,199
Platinum: Main Conference Pass, 4 Workshops, UiPath Workshop Day	\$3,999
One Workshop (a la carte)	\$569
UiPath Workshop Day	\$999

## VENDORS

PACKAGE	ONSITE
Silver: Main Conference Only (2 Days)	\$4,299
One Workshop (a la carte)	\$569

## TEAM DISCOUNTS

SEND	DISCOUNTS
3 to 4	15%
5 or more	20%

\*Discounts apply to registrations submitted together, at the same time. Cannot be combined with any other discount.  
Valid for both Primary and Vendor markets.

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OUT THIS YEAR!

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\*IQPC reserves the right to determine who is considered an End-User or a Vendor upon registration for an event. Those who are determined a vendor will be denied access to End-User pricing. These prices are featured as a limited time only promotion. IQPC reserves the right to increase these prices at its discretion.

Please note multiple discounts cannot be combined. A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

**MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC**

\*CT residents or people employed in the state of CT must add 6.35% sales tax.

Team Discounts: For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

### Special Discounts Available:

A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

### Details for making payment via EFT or wire transfer:

Bank Name: JP Morgan Chase & Co.  
Name on Account: Penton Learning Systems LLC dba IQPC  
Account #: 937-332641  
ABA/Routing #: 021000021  
Reference: 25220.006

**Payment Policy:** Payment is due in full at the time of registration and includes lunches and refreshment. Your registration will not be confirmed until payment is received and may be subject to cancellation. For IQPC's Cancellation, Postponement and Substitution Policy, please visit [www.iqpc.com/cancellation](http://www.iqpc.com/cancellation)

**Special Dietary Needs:** If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.

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