23rd North American

SSON | SHARED SERVICES & OUTSOURCING WEEK

SSOW

TRANSFORMATION FOR COMPETITIVE ADVANTAGE

March 11-14, 2019   •   Disney's Coronado Spring Resort, Orlando, Florida

☆☆☆
EARN 26 HRCI CREDITS

☆☆☆
EARN UP TO 26 CPE CREDITS

Welcome to
SSOW 2019!

Transformation for Competitive Advantage

The Shared Services industry is experiencing a great deal of transformation due to the influx of technologies such as robotic process automation (RPA) and artificial intelligence (AI). Knowing that technology is here to stay, organizations are left to figure out how it will impact people, process and already integrated technology from the individual stakeholder level to the global organization level. So, organizations must create a competitive advantage in a world filled with disruption, whether that is preparing tech capabilities, skilling up their workforce, or increasing the competencies of HR, IT or F&A to serve the needs of their customers. SSOW provides a place where these stakeholders can work together, learn the best practices and skills, develop an understanding of how outsourcing is changing, explore new innovations, learn about enhanced operating models and transition effectively and efficiently through an ever changing environment.

Shared Services and Outsourcing Week (SSOW) is the largest event in the world for shared services, global business services, and automation leaders to come together as a community. It joins well established SSOs, those in the process of development, and those just starting out on their journey.

We look forward to welcoming you on March 11-14 in Orlando.

Regards,

The SSON Team

KEYNOTES & SPEAKERS

FUTURE OF BUSINESS SERVICES

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What is SSOW?

The Shared Services and Outsourcing Week North America is the world's largest event for shared services, GBS, outsourcing and intelligent automation leaders. With a combination of cutting edge content and one-stop-shopping for all your provider needs, this is where you will unlock your potential by converting industry disruption into competitive advantage.
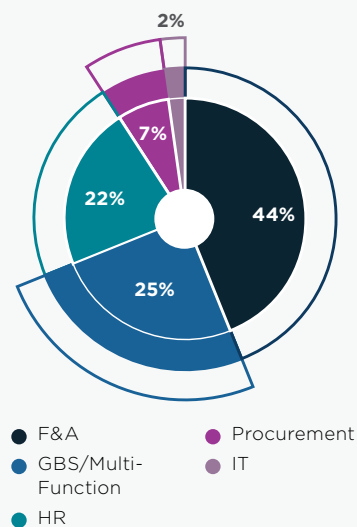
SSOW

BY THE NUMBERS
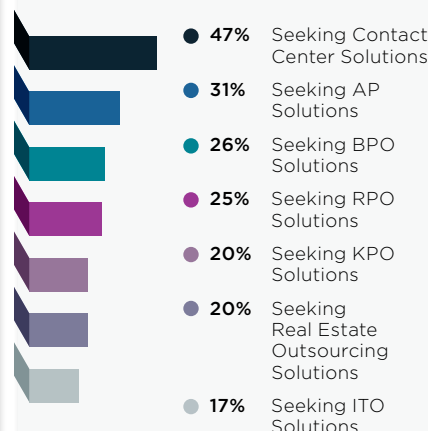### Get to know our attendees

950+ Attendees

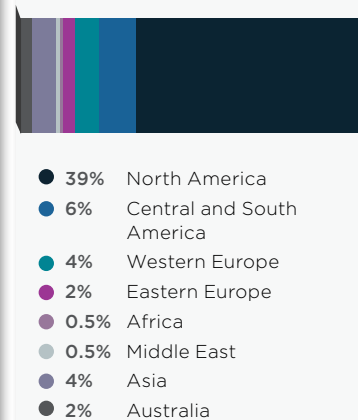**3:1** Practitioner to Vendor Ratio

60% New Accounts YoY

ATTENDEE JOB FUNCTION

- 2%
- 7%
- 22%
- 44%
- 25%

- ● F&A
- ● GBS/Multi-Function
- ● HR
- ● Procurement
- ● IT

OUR ATTENDEES ARE LOOKING FOR THE FOLLOWING SOLUTIONS IN THE NEXT 12 MONTHS

- ● **47%** Seeking Contact Center Solutions
- ● **31%** Seeking AP Solutions
- ● **26%** Seeking BPO Solutions
- ● **25%** Seeking RPO Solutions
- ● **20%** Seeking KPO Solutions
- ● **20%** Seeking Real Estate Outsourcing Solutions
- ● **17%** Seeking ITO Solutions

OUR ATTENDEES ARE LOOKING INTO SOLUTIONS IN

- ● **39%** North America
- ● **6%** Central and South America
- ● **4%** Western Europe
- ● **2%** Eastern Europe
- ● **0.5%** Africa
- ● **0.5%** Middle East
- ● **4%** Asia
- ● **2%** Australia

INDUSTRY BREAKDOWN

- ● **19%** Healthcare Services, Pharmaceutical, CRO, Laboratories, Biotechnology
- ● **16%** Media, Technology, IT, Social Networking, Entertainment
- ● **15%** Financial Services, Holding, Trading, Investment
- ● **11%** Engineering, Construction, Industrial Government
- ● **10%** Consulting, Professional Services, Business Services
- ● **8%** Consumer Products, Food, Agriculture
- ● **6%** Energy, Oil & Gas
- ● **4%** Hospitality, Hotels, Resorts
- ● **4%** Automotives
- ● **4%** Security, Property, Real Estate
- ● **2%** Shopping Malls, Retail
- ● **1%** Education Services, Research
- ● **0.25%** Furniture, Home Development
- ● **0.10%** Packaging, Shipping Services

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Advisory Board

Debbie Ballard
Vice President
McDonald's

Robert Cecil
Partner
KPMG

Graham Russell
Director BPO
WPP

Cindy Gallagher
CEO
LibertySource

Kapil Jain
SVP, Global Head of
Sales and Enterprise
Capability
Infosys BPM

Jay Desai
Senior Director of
Outsourcing CoE
AbbVie

Lee Coulter
CEO, Shared Services
**Ascension Health
Ministry**

Scott Manning
Partner
ScottMadden

Ed Hansen
Partner
Morgan Lewis

> "At SSOW 2019 I am most looking forward to networking with other companies who are taking a similar journey as our GBS Organization as well as understanding how they may have solved the same problems we are facing. What I have learned over time is the value of learning from others who have gone before you and how those lessons learned can accelerate your journey."
>
> Debbie Ballard, Vice President, **McDonald's**

> "As always, looking forward to three great, action packed days at the shared services industry's flagship event where we will have tremendous opportunities to hear from street savvy speakers and network with our peers and partners! As our world adopts increasing levels of intelligent automation, this is our campus for learning the latest technologies and success stories."
>
> Graham Russell, Director BPO, **WPP**

> "The SSON awards provide a great opportunity to celebrate amazing accomplishments across a variety of industries and verticals. These prestigious awards offer insights into how the best-of-the best develop new capabilities and harness the talents of their teams to move their organizations forward. All of our award nominees demonstrate the power of teamwork, collaboration and dedication. The pride they have for their work product and accomplishments shines through in the amazing stories they tell."
>
> Cindy Gallagher, CEO, **LibertySource**

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Big Picture Keynotes

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Cathy O'Dowd

1st woman to Climb Mt Everest from Both Sides & Author of Just For The Love Of It

Topic

Think Like an Explorer
Doing What Has Never Been Done Before

Bettina Warburg

Blockchain Researcher, Entrepreneur & Educator. One of the first TED speakers to unpack blockchain and describe how it will revolutionize enterprise transactions.

Topic

Unleashing Blockchain
For the Enterprise

Robert Richman

Culture Architect and Customer Experience Expert, Co-Creator of Zappos Insights

Topic

The Game Changing Experience:
Building a Culture of Customer Service that Crutches It!

Industry Keynotes

Kamila Grembowicz
SVP, Global Business Services
Adidas Group

Steven Jo
COO, Transformation Office
Silicon Valley Bank

Suzanne Leopoldi-Nichols
President of Global Business Services
UPS

Cathy Bilotta
Senior Director, Strategic Initiatives, GBS
Raytheon

John Standring
SVP & GM Global Servicing Operations
American Express

Alexander von Thielmann
SVP of Shared Services
Siemens

Tony Padilla
Director - Information Services &
Enterprise Services
Boeing

Kelly Litster
SVP, Financial Shared Services
MGM Resorts International

Rodney Bergman
SVP, Global Business Services
Celestica

Auston Davis
CISO
Stanford Children's Hospital

Ryan Loy
CIO
EBSCO

David Naismith
Senior Director, Strategy & Operations -
Employee Services
Cisco

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Industry Speakers

Kris Ahrend
President of U.S. Shared Services
Warner Music Group (NEW)

James Alessandrini
Director, HR Analytics & Shared Services
Loews (NEW)

Juan Araya
Senior Lead, CoE, Latam
Uber (NEW)

Yazdi Bagli
SVP, GBS and Emerging Technologies
Walmart (NEW)

Nitin Batra
Managing Director, Global COO, Legal
Citi (NEW)

Doug Becker
Director, HR Technology
Trinity Health (NEW)

David Bedard
SVP, Finance Service Organization
New York Life (NEW)

Satish Bengeri
Senior Director of Global Robotic Process Automation
Cargill

Todd Blevins
VP, Shared Services
UL

Lori Bondar
VP, Controller & Chief Accounting Officer
Avery Dennison

Robert Bradford
SVP, GBS
Akzonobel (NEW)

Sue Brauer
VP, Strategy & Transformation, Finance Operations
Pearson (NEW)

Gary Burke
VP, Finance Transformation & Shared Services
Honeywell (NEW)

Kym Burke
Director, HR Services
The Mosaic Company

Amy Burns
VP, Six Sigma
McKesson (NEW)

Kris Caskey
VP of Shared Services
PGA Tour (NEW)

Erin Champlin
VP, Global Services & Enterprise Transformation
Johnson & Johnson

Chuy Michel
Director, GBS
Herbalife (NEW)

Sue Danino
VP, of Finance
Hubbell Incorporated (NEW)

Ryan Davis
SVP, Procurement Management
Bank of America

Daniel Davidson
VP of Finance Shared Services
Equifax (NEW)

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Kristin Deegan
VP, HR Shared Services and Technology
Cox Automotive Inc.
(NEW)

Sue Dempsey
Sr. Director, NA GBS Services Lead
Kellogg Company
(NEW)

Nadia De Villa
VP, Head of Digital Transformation & Business
Manulife *(NEW)*

Tom Dewaele
VP, Global HR Services
Unilever *(NEW)*

Mark Etwaru
Digital Transformation Leader
Estee Lauder *(NEW)*

David Evangelista
SVP, & General Manager
McKesson *(NEW)*

Antoine Ezell
VP, Enterprise Capabilities & Solutions
Eli Lilly and Company
(NEW)

Quasar Hamirani
Head of People Ops
Airbnb

Julie Harbert
VP of Shared Services
Entergy

Mary Agoglia Hoeltzel
VP & Global CAO
Cigna

Chad Keenen
Director of Shared Services
Corning Incorporated
(NEW)

Shelia Knuckles
Senior Manager
Daltile *(NEW)*

Michael Konstas
VP of Financial Shared Services
American Express Global Travel Business
(NEW)

Manny Korakis
SVP – Corporate Controller and CAO
IQVIA Holdings

Qiana Levy
Head of Global Procurement and Strategic Sourcing
Learfield

Wendy Lucio
VP, HR Shared Services
Southwire Company
(NEW)

Deepak Luthra
Digital Innovation and Transformation Lead
Bristol-Myers Squib

(NEW)

Jeff Machols
VP, Head of Continuous Improvement Center
Voya *(NEW)*

Chris McCann
Director of Strategy and Enablement, Global Business Services
Bose

Dan Melchior
VP of Global Enablement: Process & Capabilities
McCormick *(NEW)*

Marcia Moran
VP, Global Finance Shared Services
Mylan

Industry Speakers

Charles Morgan
VP, Finance Shared Services
Aetna

Lisa Murphy
VP, Global Shared Services
Whole Foods Market
(NEW)

Tom Nesteruk
EVP, Shared Services
CACI

Eddie Northen
SVP, CFO and Treasurer
Rollins, Inc.

Bill Parker
VP of GBS
AECOM

Claudia Petrocchi
Head of Global HR Customer Support Services and IM CoE
Ericsson *(NEW)*

Robert Phillips
AVP, Finance and Continuous Improvement
Canadian Tire Corporation

Shadi Rezvan
Senior Manager of Shared Services Transformation
Twitter

Xavier Rodriguez
Global Director, Finance Shared Business Services
Technicolor *(NEW)*

Tony Saldanha
VP, IT & GBS, **formerly P&G** *(NEW)*

Ken Somers
VP & Head of Strategy and Governance - Enterprise Shared Services at
XL Catlin *(NEW)*

John Sparks
Senior Director, Shared Services Operations
World Vision

Victor Susman
Senior Director, GBS Global Delivery
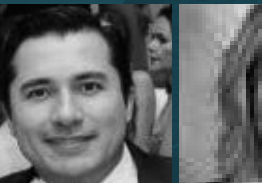**Kimberly Clark** *(NEW)*

Richard Swan
President
Koch Business Solutions
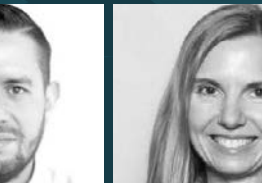
John Transier
SVP, Finance
Harland Clarke

Marianela Urgelles
Shared Service Center Director
Intel Corporation
(NEW)

Ruben Vargas
Sourcing Director
Thomson Reuters
(NEW)

Kristin White
Senior Director of Financial Controls and Risk Management
Cisco Systems
(NEW)

Christian Yllescas
Business Service Head for the Americas
LEDVANCE *(NEW)*

Karla Younger
VP, HR Shared Services
Coca-Cola Company

Pamela Wolfe
Chief, Enterprise Services Division
NASA

Pam Velcheck
Senior Manager, HR Global Service Delivery Lead
General Mills

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Plenary and Keynote Overview

Tuesday, March 12, 2019
DAY 1

PANEL: Using Transformation as an Opportunity in Shared Services and GBS

FIRESIDE CHAT: Robotic Process Automation State-of-the-State: Where We Are and Where We're Heading
Hosted by: **AutomationAnywhere**

PLENARY: 1300% Increase in Cyber Attacks: How to Protect Your SSO

PLENARY: The Future of Work & Shared Services: Preparing Your Teams for Organizational Change & Untapped Opportunity
Hosted By: **ScottMadden**

PANEL: Lessons from Deconstructed and Reconstructed Global Business Services

Wednesday, March 13, 2019
DAY 2

BIG PICTURE: Unleashing Blockchain for Enterprise
Bettina Warburg, Blockchain Researcher, **Entrepreneur & Educator**

PLENARY PANEL: When Digital Meets Business Process Outsourcing
Hosted by: **Infosys BPM**

PLENARY: The Evolution Story: Intelligent Automation on Demand
Hosted by **Antworks**

PLENARY: Operating Models of the Future – What to Expect in 2030
Hosted by: **ISG**

PLENARY: The Evolution Story: Digital Operations through AI-Driven Automation
Hosted by: **WorkFusion**

PLENARY PANEL: The Results Are In! Meet The Most Admired SSOs in the World
Hosted By: **SSON Analytics**

BIG PICTURE: The Game Changing Experience: Building a Culture of Customer Service that Crutches It!
Robert Richman, Culture Architect and Customer Experience Expert, Co-Creator of **Zappos Insights**

Thursday, March 14, 2019
DAY 3

BIG PICTURE: Think Like an Explorer: Doing What Has Never Been Done Before
Cathy O'Dowd, **1st Female to Summit Mt. Everest**

PLENARY: Your Competitive Edge: Embracing "Customer Experience" Strategy for Shared Services

KEYNOTE: The Changing Landscape of Sourcing in a Post-Automation World

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WHAT WILL *tracks focus on* IN 2019?

Brand New Tracks for 2019!

Shared Services Essentials
(No RPA Content in This Track)

You asked for it! More content focused on value creating opportunities beyond RPA. This track is VOID of any discussion around intelligent automation. What you will find, are loads of best practices for scope expansion, change management, metrics, continuous improvement and more!

Disruptive Technology

Many shared services organizations are now at a point where they have multiple bots up and running. So, they want to learn how they can **expand upon RPA** towards machine learning, AI and cognitive computing. This track will explore real life case studies of organizations who have and are deploying the next generation of disruptive tech.

Moving Up the Maturity Curve!

Planning and Launching

Starting out on a journey towards developing shared services? This track will explore the key considerations, challenges and opportunities to building and sustaining a winning SSO!

Evolving

You've made it past the first 18 months, and have your SSO up and running. What's next? Sessions in this track will offer guidance on strategy development and long-term value creation through functional expansion, E2E transformation, talent development and more!

Spotlight on LATAM

Designed exclusively for business service leaders in the Latin America region, these sessions lay the groundwork for business service transformation through people, process, change and technology. LATAM leaders from Uber, Thomson Reuters, Ledvance, Herbalife and many others will talk RPA, IA, cultural transformation and more!

Functional Focused Tracks!

Finance & Accounting

The finance and accounting function is seeing tremendous change. Driven by automation and pressures to elevate the strategic nature of the business, F&A Leaders are working tirelessly towards functional excellence. Take away best practices for achieving enhanced visibility, stronger compliance and a faster close. Learn how to optimize the vast array of digital technologies for modern day finance.

Customer Experience

The difference between success and failure can commonly be found in how much time is invested in meeting the needs customers. This track will explore strategies to engage employees more effectively and elevate shared services within an organization.

Intelligent Automation Track

Hosted by Automation Anywhere this track features best practices and top-quartile case studies to begin and advance your digital workforce journey with Bots. Sessions focus on robotic process automation (RPA), cognitive cognitive automation and embedded analytics.

Analytics in Shared Services

With meaningful data more readily available, SSOs have the opportunity to inform strategic and operational decisions. This track will focus on how to master data and use various analytics to move shared services up the value chain.

Women in Shared Services

We are familiar with the typical issues regarding gender bias in the workplace. Despite these findings, there are still far too many women in leadership positions, especially those in shared services who should have a clear path to the C-suite. This track will suggest ways to identify and empower high performing women and provide specific examples on how to close the gender gap.

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Future Of Business Services

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BY INVITATION ONLY
Hosted by: **KPMG**

Main Conference Day 1
Tuesday, March 12th, 2019 • 3:40 - 5:50

3:40 - 4:20	**Engineering a Culture of Customer Intimacy at Scale**
4:25 - 5:05	**How Business Services Enables Movement of 21st Century Enterprise**
5:10 - 5:50	**The Role of Outsourcing in an Age of Automation**

Main Conference Day 2
Wednesday, March 13th, 2019 • 3:10 - 5:20

3:10 - 3:50	**Workforce of the Future**
3:55 - 4:35	**End-to-End Transformation**
4:40 - 5:20	**Analytics in Shared Services and Global Business Services**

To confirm eligibility and register to attend contact Kayla.Ambrose@iqpc.com

Do I Qualify?

Access to the Future Business Services Room is available solely to individuals who meet all of the below, clearly defined criteria:

- Multi-Location (Minimum of 2 centers that are geographically diverse)
- Multi-Process (Minimum of 5)
- External Budget of at least 5 million
- Company revenue at least 5B+
- Has 5+ years experience in running a SSO

FAN FAVORITE IN 2018!

PRESENTING OUR 2019

Shared Services and Outsourcing Week

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Pre-Conference Site Tour Day

1:00 – 6:00   Site Tours Hosted By: Johnson & Johnson, Coca Cola, Citi & Bristol-Myers Squibb

SITE TOUR A	SITE TOUR B	SITE TOUR C	SITE TOUR D

JOHNSON & JOHNSON GLOBAL SERVICES TOUR: Elevating the Employee Experience

As a global leader in healthcare, J&J was challenged to adapt to the changing field, maximize competitiveness in their business sectors, and continue to benefit patients, customers, and consumers over the long term.

Their Global Services Organization was created as part of an enterprise program. It focused on delivering simplified, standardized services and establishing 5 regional hubs to provide services across J&J's HR, Procurement and Finance functions.

Global Services and all five regional hubs have been created with the "employee experience" at the center. The impact? Employee engagement scores higher than the industry average, and increased productivity and greater value for our organization and customers.

During this site tour, participants will explore J&J's:

- National Hub in Tampa, which was founded on providing a "Great Place to Work" for employees
- Flexible working space, which has the latest technology and tools, healthy food options, fitness options, and "recharge" spaces
- Journey towards establishing a global services organization that operates with a defined culture and programs for sustainable growth.

Limited to the first 50 people.

COCA-COLA: Into The World of HR Intelligent Automation and Beyond

In 2009, Coca-Cola Enterprises opened a North American HR SSC. In 2010, it was acquired by The Coca-Cola Company amid company integration work to create a new business unit –Coca-Cola Refreshments. Now, after further internal company transformation, the HR SSC is part of a multi-function business service providing support to Coca-Cola franchise bottlers.

The HR SSC has over has 200 employees and has put a focus on chatbots, robotic process automation and artificial intelligence to improve the employee experience, while continuing to drive process and technology improvement.

This is an exciting opportunity to see firsthand how Coca Cola is using automation within HR processes.

During this site tour, participants will explore:

- The Employee Contact Center
- Personnel Administration
- Payroll Operations
- Talent Acquisition
- HR Support (includes knowledge content and business process management solution)

Hosted By: Karla Younger, VP, HR Shared Services, **Coca-Cola**

Limited to the first 70 people.

CITI: Shared Services Center Tampa

The Citi Tampa site established in 1983 supports more than 30 unique lines of business including: a large Anti-Money Laundering Operations, Shared Services, Global Banking Functions, an Institutional Client Group and Technology operations. Citi maintains proactive relationships with 20 community partners and has donated nearly $250,000 throughout the Tampa Bay community.

With more than 7,400 employees, the Citi Tampa site has experienced a work evolution from a process-oriented site to a more client-centric and middle office roles today.

As part of the tour of Citi Tampa visitors will:

- Learn how Citi processes and manages work across global locations.
- Get a first-hand look at a Global Security Operations Center
- Explore how employees work in a shared services environment

Hosted By: Jennifer Suarez Jankes, Director and Associate General Counsel, **Citi Tampa** & Sterling Ivey, Site Manager and Public Affairs Director, **Citi Tampa**

Limited to the first 50 people.

BRISTOL-MYERS SQUIBB: North American Capability Center Site Tour

The Bristol-Myers Squibb North America Capability Center, which opened in January, 2014, recently expanded to a state-of-the-art facility in Tampa, Florida, and provides strategic assets for delivering end-to end process excellence and innovation.

The center offers high knowledge-based capabilities and services across multiple disciplines and is part of our ongoing effort in continuous process improvement. The site has over 500 employees collaborating in R&D, Business Operations, Finance, IT, Commercial and Marketing Services and Human Resources. At the North America Capability Center, BMS continues to explore ways to simplify processes and increase the efficiency and effectiveness of our operations.

Hosted By: Wayne Lewis, Associate Director, Communications and Community Relations, **Bristol-Myers Squibb**

Limited to the first 30 people

6:30 PM

Welcome Mixer!
Come Join the Outdoor Fiesta

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8:00 - 10:00   **Interactive Workshops A-E**

WORKSHOP A	WORKSHOP B	WORKSHOP C	WORKSHOP D	WORKSHOP E

WORKSHOP A

Shared Services 101: Setting A Course For Success and Avoiding Possible Pitfalls

A clear strategy, a detailed business case, a phased approach and a focus on change management are critical to the success of a new shared service operation. This workshop will delve into the must haves for shared service success and explore the most common implementation pitfalls to keep you ahead of the curve.

In this workshop, participants will:

- Discuss the strategic drivers for attracting corporate budget/ funding
- Highlight the critical activities for design, implementation and stabilization
- Review the key tech and automation available
- Review the common design and implementation pitfalls
- Pinpoint the practical change management techniques to win in business

Brad DeMent, Partner, **ScottMadden**

Hosted By:

scottmadden

WORKSHOP B

Building Next Generation HR Shared Services: 5 Steps to Creating & Delivering Higher Value Services

With the emergence and maturity of self-service, integrated services, intelligent automation and analytics, how does your HRSSO navigate this ever-changing landscape? Figuring out what deserves the most focus in the next 18 – 24 months, developing a strategic framework and successfully carrying out new initiatives will set the course for greater value, enhanced employee experience, competitive advantage and greater ROI. Your leadership will thank you!

In this workshop, participants will:

- Examine the top priorities of top performing HR SSOs
- Evaluate ways to stay current with customer needs and desires
- Create a roadmap for the next 18 -24 months
- Develop a guide to start implementing self-service options or refine those already in place
- Build a step-by-step strategy to fully automate HR processes

WORKSHOP C

Blockchain Implications & Benefits for F&A Processes

Business blockchains are being used today to help reinvent how transactions are managed. They can reduce the time and cost of almost any process, enabling near real-time operations. Business Blockchains deliver a high degree of accuracy and with significantly less risk than many alternatives. So, how can SSOs begin integrating blockchain capabilities into their organizations? Learning about blockchain technology basics, assessing how blockchain is an opportunity for SSOs, and outlining the first steps towards blockchain implementation are a good starting points.

In this workshop, participants will:

- Develop a clear understanding Blockchain 101 and the advantages of adding it to processes
- Examine where blockchain can have the most impact on end-to-end F&A processes
- Assess several use cases for blockchain and F&A processes
- Evaluate the limits of blockchain's applicability within F&A

WORKSHOP D

Roadmap for Your First 12 to 18 Months of RPA Implementation

Robotic Process Automation can provide significant benefits to SSOs seeking to automate processes, increase productivity and free up hours to take on more value added work. So, how do you get started? What do you do once you have your first bot in place? What comes next? What trends do you need to be thinking about in this evolving area? This session is ideal for those who are launching, or have their first few bots and are looking to increase their supply.

In this workshop, participants will:

- Explore the most common goals of implementing RPA as well as the risks involved
- Discuss how to 'sell' RPA to stakeholders when launching and how to gain support for growing your program
- Dissect lessons learned from planning and implementation
- Examine how to select and assemble robots in a process with workflow and process orchestration
- Outline the trends you need to be aware of for the next 12 to 24 months

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

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

Hosted By: Chazey Partners

WORKSHOP E

Competencies for Effective Senior-Level Shared Services Leadership

While the ability to cut costs and achieve revenue growth will always be important, today's leaders must exhibit skills sets way beyond a transactional executor. The current environment requires leaders to have cheetah-like speed and agility, to be a strategic visionary, to take calculated risks, and have the ability to break down silos while managing the change presented in geographic expansion. However, often leaders are reluctant to let go of what got them to their current state of success. For those leaders who make this expansion, the rewards are positive, their people grow, engagement increases, creativity emerges, and through greater alignment, more is achieved in shorter time.

In this session, participants will:

- Discuss the shared services competencies required in an ever-changing environment
- Move from a management mentality to incorporate more complex leadership skills
- Receive proven strategies to sharpen people-related sills
- Receive a development plan to kick-start transformation efforts
- Move from doing to influencing in complexity, setting direction, creating a culture and building alignment

Cindy Haffafey, Managing Director, **UHY**

Hosted By: UHY

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10:15 - 12:15   **Interactive Workshops F-J**

WORKSHOP F	WORKSHOP G	WORKSHOP H	WORKSHOP I	WORKSHOP J

WORKSHOP F

Shared Services 501: Taking Your Service Delivery Organization to the Next Level

Value creation falters when things are stagnate. So, it is essential to increase offerings in a manageable framework and rethink a traditional view of shared services.

In this workshop, participants will:

- Create an outline for digital strategy
- Map out sustainable governance structures for RPA (Robotic Process Automation) and IA (Intelligent Automation)
- Identify ways to continue to expand Centers of Excellence (CoEs)
- Examine additional ways to expand to regional or global delivery models
- Evaluate ways to launch predictive and prescriptive analytics
- Dissect ways to achieve business customization without losing efficiency

Brad DeMent, Partner, **ScottMadden**

Hosted By:

scottmadden
MANAGEMENT CONSULTANTS

WORKSHOP G

Continuous Improvement 2.0: Embedding Into the Fabric of Shared Services

As shared services structures, technologies and processes continue to evolve at a rapid pace, traditional CI programs may no longer suffice. To keep pace with advancements in automation, RPA, Machine Learning and BPM-based CI, now is the time to reassess our current programs, metrics,strategies and methodologies. The idea of CI in the digital age does not mean that the core goal is different. Rather, the path we take to get there must match up to a new strategy and set of goals.

In this workshop, participants will:

- Discuss how and where Continuous Improvement fits into a successful IA program
- Understand how to identify processes for automation and their problem statements and risks
- Develop a roadmap with a supporting business case showcasing the value of your automation program
- Identify up and downstream processes from your process that are ripe for intelligent automation to ensure maximum success
- Understand the advantages that customers and associates can derive from the typical improvement benefits that automation can provide

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

Darin Munn, Automation Implementation Lead, **Agilify**

Hosted By: Agilify

WORKSHOP H

How Design Thinking Can Improve the Success of Your SSO

The exploration of design thinking allows leaders to take a human-centric approach to defining, reframing, ideating, prototyping and testing solutions for issues that may face an organization. It is no wonder shared services owners are using it to develop and deliver superior customer experiences, and and to new and innovative ways to serve their customer base and reduce costs.

In this workshop, participants will:

- Conduct a careful assessment of the pros and cons to using design thinking to produce more disruptive solution ideas
- Strategize ways to collaborate effectively with partners that to help increase capacity and capabilities to create successful transformation in various shared service functions
- Align design thinking with cultural expectations of shared services stakeholders
- Generate new and innovative solutions that can be implemented in HR functions and beyond
- Outline strategies to use design thinking to solve daily issues

WORKSHOP I

Beyond Implementation: Taking Your RPA Program to New Heights

One bot is live, but you want multiple bots with the same status. It is time to reflect on what worked, what didn't work, what ROI the implementation provided, how future implementation might change governance structures and what technologies might be disrupting SSOs next.

In this workshop, participants will:

- Explore cases of top performing RPA implementation in SSOs
- Hear what's next for organizations that have made it through pilot and implementation
- Discuss expansion plans for multiple bot deployment
- Review the different projects a robot can perform and what should be prioritized
- Learn what future cycles might look like in a world with multiple bots deployed
- Review the technologies that will be disrupting shared services organizations in the next 18 – 24 months

Mark Davison, Global Partner, Robotic Process and Cognitive Automation, **ISG**

Scott Furlong, Partner, **Information Services Group**

Hosted By: iSG

WORKSHOP J

Building End-to-End Process Management, Governance & Ownership

End-to-end process management integrates a company's business activities to match the way external parties (customers, vendors, regulators) experience the company. This drives efficiency, fuels market-based innovation and facilitates collaborative problem solving.

As transformational technologies provide new leverage for standard systems and shared service operations, end-to-end process governance provides a powerful means to integrate technology with the organization's business objectives.

In this workshop participants will:

- Review the design of an end-to-end process management approach
- Build end-to-end process management
- Structure governance models to drive operational performance improvements in business

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

Hosted By:

REDWOOD

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Main Conference Day One

11:00   **Main Conference Registration Opens & Networking**

12:30 - 12:40   **SSON Opening Remarks**

Heather King, Divisional Director, **SSON Americas**

12:40 - 12:50   **Opening Remarks from the Chairperson**

Brad DeMent, Partner, **ScottMadden**

12:50 - 1:30   **KEYNOTE PANEL: Using Transformation as an Opportunity in Shared Services & GBS**

Does it seem that every company is going through a transformation? There is no doubt that we are living in an increasingly transformative period, classified as the age of acceleration. This acceleration is illustrated by massive disruption happening at high velocity to our traditional business practices. It is an age in which entire industries are being reshaped with routine business models being rendered useless in favor of more agile people, plans and processes. It's a period where the premium for more innovative and effective shard services operating model design and execution has never been more important.Let's talk about how transformation can actually be the catalyst to finally move your SSC to multi-functional, or your multi-functional SSC to a GBS or your GBS into a truly valued business partner. We'll explore specific examples of what to do (or not do) during transformation with guidance on how to leverage new knowledge, processes, practices and talent. Don't miss this lively keynote panel to hear how several SSOs are capitalizing on their organization's transformation.

Suzanne Leopoldi-Nichols, President of GBS, **UPS**

Steven Jo, COO, Transformation Office, **Silicon Valley Bank**

Kamila Grembowicz, SVP, GBS, **Adidas Group**

Kelly Litster, SVP, Finance Shared Services, **MGM Resorts International**

Cathy Bilotta, Senior Director, Strategic Initiatives, Global Business Services, **Raytheon**

1:30 - 2:00   **PLENARY: The Future of Work & Shared Services: Preparing Your Teams for Organizational Change & Untapped Opportunity**

With 50% of the global workforce being mobile by 2022 and a massive shift in generation leadership, SSOs must be ready to handle the next wave of change. It will be essential for SSOs to leverage the convergence of technological advancements and generational shifts that are transforming the way people work. This keynote will examine global workforce trends including: the shift to digital natives, the challenges and changes affecting rules relating to U.S. visas and gender diversity within business service; the upskilling of current talent to meet and exceed new expectations in a digital era; and how to effectively cope with "automation anxiety" amongst different populations.

Hosted by: **scottmadden** MANAGEMENT CONSULTANTS

2:00 - 2:30   **FIRESIDE CHAT INTERVIEW: Robotic Process Automation State-of-the-Union: Where We Are and Where We Are Heading**

RPA is now mainstream - by 2021 the market will reach $2.9 billion dollars. This does not mean that every organization has scaled RPA fully or that some have even started on their journey towards RPA implementation. However, what it does signify, is that there are plenty of lessons learned and numerous burning questions. What is the provider community doing to keep up with demand? How are they scaling up? How are they building in AI components into current offerings and how will this impact SSOs who are down the path with RPA? What does their innovation roadmap look like? How does it differentiate from a BPO? Acquisitions and IPO - how will they keep up with new demand and maintain a level of customer service? What are the innovative RPA org. models being developed within SSOs? This fireside chat will explore the biggest successes and the largest lessons learned from RPA implantation and what the future holds for our industry.

Hosted by: **AUTOMATION ANYWHERE** Go be great.

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Main Conference Day One

2:30 - 3:10   **Networking Break and Demo Drive**

3:10 - 5:20   **Concurrent Track Sessions**
Click on one of the tracks below to view full session information

| PLANNING & LAUNCHING | EVOLVING | MATURING | SHARED SERVICES ESSENTIALS |
| DISRUPTIVE TECH | HR VISION | | |

5:25 - 5:55   **PLENARY:** 1300% Increase in Cyber Attacks: Leverage Shared Services to Protect Your Operation

A few years ago, cyber attacks were considered a 'national emergency'. Not much has changed. Interestingly, the current administration suggested that shared services can be leveraged to help address some of the unique challenges faced by agencies, and communities that can lag behind in terms of cybersecurity capabilities. This plenary will explore strategies to improve cybersecurity in SSO, what processes need to be in place, what data needs to be protected, how to create the infrastructure and foundation to protect it, how GDPR will change the way you are protecting your data, and strategies for avoiding fraud and phishing.

Auston Davis, CIO, **Stanford Children's Hospital**

Ryan Loy, CIO, **EBSCO**

5:55 - 6:35   **PANEL:** Lessons from Deconstructed & Reconstructed Global Business Services

Global business services are put into place to help optimize E2E processes, create stronger frameworks and governance, deliver expanded value through multiple functional areas and enable speed and agility at scale. The model is proving successful for many, but for some centralized groups, the model is introducing greater organizational complexity without better performance. This panel will explore the reasons organizations have chosen to deconstruct their global business services or reconstruct them as pressures, drivers and needs have changed for their organization. Further discussion will be had on why and how the change is happening, and what the future value proposition and operating model is for GBS organizations.

Alexander von Thielmann, SVP of Shared Services, **Siemens**

Tony Padilla, Director – Information Services and Enterprise Services Integration for the Office of Internal Governance and Administration, **The Boeing Company**

Rodney Bergman, SVP, Global Business Services, **Celestica**

David Naismith, Senior Director, Strategy & Operations – Employee Services, **Cisco**

6:35   **SSOW Welcome Reception**

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7:15 **Coffee & Registration**

8:00 – 8:10 **SSON Opening Remarks**

Heather King, Divisional Director, **SSON Americas**

Alyssa Kierkegaard, Deputy Divisional Director, **SSON Americas**

8:10 – 8:20 **Chairman's Opening - Day Two**

Brad DeMent, Partner, **ScottMadden**

8:20 - 9:05 **KEYNOTE:** Unleashing Blockchain for Enterprise

Imagine a world where massive industries like banking, healthcare, and insurance are dramatically transformed - a world where trade is facilitated not by age-old models of commerce and finance. Instead, it is facilitated through a distributed, transparent, and trustable system. Would there be value in moving to a system like this and what would happen to shared services if this became the new model? In this session, Bettina will explore how blockchain will change the way business view the world, what still needs to change for it to be widely implemented, what regulations are hampering the market, and what organizations are already exploring the technology in much more depth and seeing the payoff.

Bettina Warburg, Blockchain Researcher, **Entrepreneur & Educator**

9:05 - 9:35 **PANEL:** When Digital Meets Business Process Outsourcing

Digital technologies are affecting the way that BPOs are conducting business with their clients. The focus on providing omni-channel experiences, leveraging efficiencies that are being seen by implementing intelligent automation – like using chatbots,, and creating customized experiences are not going anywhere. So, how are outsourcing trends affecting SS & GBS? This panel will explore the trends that are impacting service centers, the most current strategic imperatives for outsourcing, case studies of successful digital transformation with the assistance of BPOs, and where and what are the opportunities for growth in 2019.

Moderator: Kapil Jain, Senior Vice President and Global Head of Sales and Enterprise Capability, **Infosys BPM**

Hosted by:

Infosys BPM

9:35 - 10:05 **PLENARY -** The Evolution Story: Intelligent Automation on Demand

Imagine a world where automation happens within a much shorter timeframe – a few months, weeks, days or even hours – depending upon on your level of robotic implementation. Then, imagine a world when a robot can adapt workflows as operations change. Is it possible? This session will explore what the next iteration of robotic process administration looks like, how it can adapt as your business grows and changes, what safety measures are implemented, how it will integrate with other software, and how to manage it all effectively.

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10:05 - 10:45 **Morning Coffee & Networking Demo Drive**

10:45 -12:25 **Interactive Discussion Groups – Pick Three!**

Refer to Pages 19 - 22 for more details.

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Main Conference Day Two

INTERACTIVE DISCUSSION GROUPS – PICK THREE!

During this part of SSOW, delegates will be sorted into groups of 20 to take part in Interactive Discussions around the topics below.
Delegates will get the opportunity to select three topics and will rotate between their choices every 40 minutes. Discussion groups are kept small to ensure all delegates get the opportunity to ask their most pressing questions, ensuring a perfectly tailored experience

1st Group: 10:45 - 11:15 | **2nd Group:** 11:20 - 11:50 | **3rd Group:** 11:55 - 12:25 | *5 Minutes to Move to Each New Discussion Group*

IDG 1: Is Your Talent Ready for Digital?

With new talent coming:

- What impact does the gig economy have on shared services?
- Which talents/ skills are SSOs seeking in today's environment?
- What work is best for short-term contractors?
- How are we preparing our organizations for rapid change and how are we handling resistance?
- What are examples of modern career paths?

Hosted by:

AUTOMATION ANYWHERE

Sold Out in 2018

IDG 2: Measure What Matters: Reassess Your KPIs for Ultimate Performance

With measurement being the biggest game in town:

- What metrics are you tracking?
- Which tracked metrics failed / succeeded?
- What is worth or not worth the investment?
- What metrics are most important for IT, HR and F&A SSOs to track?

IDG 3: Next Generation Travel & Expense Management

With travel and mobility an essential part of business:

- What are you doing to support the mobility needs of your customers?
- How do you manage expectations during travel issues?
- How could you better support mobility and travel?
- What processes or technology do you use for assistance?

Hosted by:

SAP Concur

IDG 4: Business Continuity Planning (BCP)

As it iscritical to test a BCP each year:

- What are other SSOs including in their communication plans in the event of emergencies?
- What is prioritized among facilities, personnel, systems, records, internal and external dependencies?
- What roles are assigned in the content of initial response, continuity plans and restoration?

IDG 5: Change Management: Morphing into a Beautiful Butterfly

With change often being ugly:

- What does effective change management look like in an SSO organization?
- What are examples of processes that can withstand change and transformation?
- Which processes tend to get muddled during change? How do you avoid this?

IDG 6: Please Take a Seat at the C-Suite Table

As getting the ear of the C-Suite is a challenge:

- What are the biggest challenges / hurdles of getting a seat at the C-Suite table?
- Which metrics have helped you get in the door and stay there as an SSO?
- What processes need to be in place to ensure your SSO is noticed by the C-Suite?

Manny Korakis, VPS - Corporate Controller and CAO, **IQVIA Holdings**

IDG 7: The Changing Value Proposition of Outsourcing

With re-upping of contracts and tech being the newest pressure on BPOs:

- Why are organizations investing in BPOs?
- What new offerings are BPO providers providing their clients?
- What do contracts look like and how are they changing in today's intelligent automation heavy space?

IDG 8: Stop Herding Cats and Start Managing Your Vendors Effectively

With vendor management always being complicated:

- Which strategies do you employ for managing multiple vendors?
- What leads to vendor management failure?
- What helps you manage vendors along the way?

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Wednesday, March 13th, 2019

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IDG 9: Using Design Thinking For Business Process Innovation

You have 40 minutes to design a SSO model:

- What would it look like?
- What functions would be omitted?
- What processes would be included?
- What processes would be left behind?
- Who would run it?
- What technologies would be used?
- What technologies would not be necessary?

James Alessandrini
Director of HR Analytics & Shared Services
Loews

IDG 10: Hack the Bot, Don't Let the RPA Bot Hack You

With bot implantation becoming more and more common:

- How is your bot ensuring that data is secure?
- How is your bot regression testing?
- How does your bot identify weaknesses?
- How are you identifying global best practices and communicating them to your bot?
- What is the real cost of implementation?

Reserved for

softomotive
We talk automation

IDG 11: Process Mining for Process Efficiency

Improving process efficiency and understanding process should be goals of any shared service leader. To that end:

- Where can process mining be applied in shared services functions?
- What are the three classifications of process mining and when can they or are they applied?
- What pieces of information are needed to launch process mining?
- What information is optional when launching?
- What will make your process mining initiative successful?

IDG 12: Destination: RPA Center of Excellence

The goal is an RPA Center of Excellence:

- How is the Center integrated into the organizational structure?
- How are roles, responsibilities and reporting lines defined?
- What does collaboration with IT architecture, infrastructure and security look like?

Hosted by:

ISG
imagine your future

Sold Out in 2018

IDG 13: Strategies for Designing Global Payroll

With automation proving to be a game changer:

- What will global payroll systems look like in the future?
- What technology platforms are being used most?
- How are SSC automating and standardizing their global payroll systems?
- What compliance measures are of most concern?
- Who is primarily managing the data?
- Is the management of data sourced internally or externally?

IDG 14: Benefits of Blockchain Applications Across Order-To-Cash, Record-To-Report & Procure-To-Pay

With blockchain being "the new cool kid in town", SSOs need to know:

- How blockchain be used in shared services?
- How blockchain can be useful outside of finance and accounting shared services?
- What other technologies apart from blockchain might have a real impact and why?

IDG 15: Developing Global Process Owners

With global process ownership being advantageous:

- What are the best reasons to have global process owners?
- How does one design and implement a scalable structure for sustained success?
- How does a SSO change procedures and governance guidelines into helpful tools for GPO success?
- How do you implement and utilize global measurements and metrics?

IDG 16: HR Excellence: Driving a Fanatical Focus on Employee Experience via Self-Service

With the employee experience key to the success of shared services:

- What common practices are SSOs employing to ensure that customers feel good about their experiences?
- What self-services are you adding?
- Which traditional models are no longer working or are still functioning?

Main Conference Day Two

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IDG 17: High-Performance Record-to-Report

With a clean record-to-report being the goal:

- How has record-to-report evolved in the last year?
- What are the biggest challenges in record-to-report?
- How can you achieve high performance record-to-report processes?

Michael Schultz, Director of Finance Transformation, **Blackline**

Hosted by:

BLACKLINE

IDG 18: Branding Your SSO to Attract and Retain Talent

With turnover still a huge cost to an organization:

- What strategies are you employing to build a brand that helps attract millennials and retain them?
- What strategies are working or not working to bring in talent?
- How are you developing a vision that will inspire your customers today, tomorrow and in the future?

Amy Gallagher, Managing Director, **UHY Advisors**

Hosted by:

UHY

IDG 19: The Future of Procure to Pay

With secure payments as a top goal:

- What are some of the benefits and challenges of procure-to-pay for in-house deployment, running in the cloud, and private SaaS hosting?
- How are you measuring ROI?
- How do you better maintain control and avoid security issues depending on how you deploy you procure-to-pay?

Hosted by:

direct commerce

IDG 20: Evolution of Order-to-Cash

Finance functions have been seeing a great deal of change:

- How has order-to-cash evolved in the last year?
- What are the biggest challenges you face in processing documents in order-to-cash?
- How has automation helped in the processing of order-to-cash? What opportunities does automating create for a SSOs?

Hosted by:

WorkFusion

IDG 21: The Latin America Shared Services Landscape

With today's sourcing landscape in flux:

- What are the benefits to looking towards the LATAM vs other global locations?
- What are the tax benefits of choosing a LATAM location?
- What value are SSOs in LATAM seeing in today's changing market?

Ruben Vargas, Sourcing Director, **Thomson Reuters**

IDG 22: What Artificial Intelligence Can Do For Shared Services Processing

With value being at the core of what shared services stakeholders do:

- Can AI really create thousands of hours of saved time?
- How is AI helping finance, HR and other functions?
- What inefficiencies is AI helping to solve in shared services?
- How much is it actually costing to implement AI in shared services organizations?

Hosted by:

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IDG 23: GDPR Impact on Global Services Delivery

Since it is common knowledge that GDPR is here to stay:

- How are you ensuring compliance?
- How has GDPR changed processes?
- How has it affected the way that you gather data?

IDG 24: Analytics Market Evolution & Trends

With core analytics capabilities remaining in demand, more SSOs invest in exponential technologies to gain a competitive advantage:

- What analytics are showing the most promise – AI and cognitive analytics, machine learning or predictive analytics
- How will the Internet of Things (IoT) influence the work that SSOs are doing?

Main Conference Day Two

IDG 25: Mobile as a Platform for Digital HR Shared Services

With the movement towards mobile platforms becoming more and more common:

- What processes are most common from a technological standpoint?
- What has seen failure to launch in the mobile shared services space?
- What are typical roadblocks to adoption and how do you overcome them?

IDG 26: Using AI Chatbots in HR Shared Services

With more and more HRSSOs moving from transactional to transformational:

- How are HRSSOs using AI chatbots?
- How are chatbots proving to be an effective solution in HRSS?
- What processes do they handle well / not well?
- What outcomes can you expect from using chatbots?
- What customer service levels are increasing or decreasing?

IDG 27: Commercializing Shared Services via Carve-Outs

The back-office hasn't been looked at as a solution to balance sheet problems, the "carve out" approach many provide a new way to create a promising future for an organization.

- What three core structural models – joint venture scenarios, selling assets outright, and outsourcing – are being used in carve outs?
- What opportunities are carve outs creating?
- What challenges have to be overcome to successfully implement carve outs?
- How can an SSO gauge readiness for using carve-out models to provide more revenue?

Debroah Kops, Founder, **Sourcing Change**

IDG 28: The Growth of Digitally-Enabled Global Business Services - Are We Really Making Headway?

With technologies affecting the entire system:

- How are technologies affecting GBS processes?
- What does a digitally-enabled GBS look like?
- How do internal and external functions change once technology been deployed?
- What might a GBS of the future look like?
- How is technology governed in a GBS?
- Is it all working? if not, are we making our move back to shared services?

IDG 29: Evolving Your Master Data Management (MDM) Strategy

With data reporting at the center of many decisions:

- How are SSOs governing data decisions?
- What are SSOs reporting on as it applies to data management?
- What data manipulations are more likely to happen if a function has a more vested interest?
- How are organizations tapping into analytics talent within their SSO?

IDG 30: Using Business Process Management (BPM) Tech to Manage Workflow and Track Data

While monitoring, evaluating and maintaining a path towards process and project success:

- What BPM software has proven to be best in class and why?
- How can a SSO effectively find a BPM that meets its modeling, automation, execution, control, measurement, optimization and enterprise needs and goals?
- What can an SSO do after it has chosen a BPM software and goals and needs to change?

IDG 31: Building a Latin America SSO

- Determine your readiness to pilot
- Discuss major points of failure (and how to mitigate) when launching your SSO
- Highlight methods for introducing a lean culture from the start
- Lay the framework to move from transactional to strategic services

Christian Yllescas, Business Service Head for the Americas, **LEDVANCE**

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Main Conference Day Two

12:25 - 1:25   **Networking Lunch**

1:25 - 1:55   **PLENARY: Operating Models of the Future – What to Expect in 2030**

Ten years from now, what operating model will your shared services organization be focused on? Will it be a single function, multi-function or global business services operating model? Will the SSO of the culture be virtual or physical? What technologies will be part of the operating model? Or, will it be something different altogether? This plenary will explore and predict what the SSO of the future might look like as they seek to move higher in the value chain by improving and adapting models for better results and heighted ROI.

Hosted by: **iSG**

1:55 - 2:35   **PLENARY: Digital Operations through AI-Driven Automation**

The lifespan of estavblished companies is declining while born-digital companies take market share and create new markets. Why is this? It isn't just that they're small and agile. It's that they're built on technology designed to continuously learn and adapt, which makes their people better equipped to make better decisions and execute faster. Leading enterprises in every industry are using AI-driven process automation to digitize their back and middle operations to provide the same speed, accuracy and efficiency of service delivery as born-digital companies. In this presentation, participants will learn how to mitigate the operational problems that limit growth and compromise customer service.

Hosted by: **WorkFusion**

2:35 - 3:35   **Networking Break and Demo Drive**

3:35 - 5:35   **Concurrent Track Sessions**

Click on one of the tracks below to view full session information

FINANCE & ACCOUNTING	HR VISION
CUSTOMER EXPERIENCE	INTELLIGENT AUTOMATION

5:40 - 6:20   **KEYNOTE: The Game Changing Experience: Building a Culture of Customer Service that Crutches It!**

Disruption is changing every market, at internet speed. And it all feels like chaos, until patterns emerge. Those who know the patterns can do more than predict the future. They can create it. Robert Richman was culture strategist for Zappos.com. He has spoken for Google, Toyota, Eli Lilly, and many other game changing organizations, including the National Security Agency. Robert will share with us how the speaking industry could be disrupted, and how we can get ahead of that curve. Zappos is the company most people think of when they hear the phrase "Culture eats strategy for breakfast." Culture is all the buzz, and there is one thing that drives it..."It all comes down to one factor. It doesn't matter the industry. Whether it's about staying at a hotel, buying a product online, or using a mobile app, experience trumps everything," Robert says. "Experience ultimately beats content and cost. It even beats time. People will stay on a waitlist for months for a better experience, as Tesla showed us."Robert will share how we can create great experiences for our customers and people alike. And rather than just talking about experiences, he will co-create an experience for us to take your company to the next level.

Robert Richman, Culture Architect and Customer Experience Expert, **Co-Creator of Zappos Insights**

Main Conference Day Two

6:20 - 6:50 **The Results Are in! Meet the Most Admired SSOs in the World**

Are you maximizing your shared services organizations metrics? Shared services have always been focused on monitoring KPIs and keeping close tabs on industry benchmarks and "best-in-class". However, practical application of all those numbers is different, and it can be a challenge to know if you are even evaluating the right numbers. **This session will explore practitioner insights from SSON's 2018 "Most Admired SSOs"** to derive what real business benefits can be driven from crunching the aggregated data of their peer set and beyond, key early journey compass-setting, how to normalize data collection as you mature, and using roadmap forecasting to establish a baseline for simulating future data for comparison.

Syazana Li,. Data Research Analyst, **SSON Analytics**

Karla Younger, VP, HR Services, **The Coca-Cola Company**

Rodney Bergman, SVP, Global Business Services, **Celestica**

6:50 **Champagne Toast**

7:45 **SSOW Impact Awards Gala**

Hosted by: **iSG**

Change Management Impact Award

Process Improvement & Value Creation Award

Customer Centricity Impact Award

Business Transformation Impact Award

Automation Impact Award
Presented by: **AUTOMATION ANYWHERE**

Creative Talent Management Award

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Main Conference Day Three

7:30 - 8:00 **Coffee & Registration**

8:00 - 8:05 **SSON Opening Remarks**

Alyssa Kierkegaard, Deputy Divisional Director, **SSON Americas**

8:05 - 8:15 **Chairman's Opening – Day Three**

Brad DeMent, Partner, **ScottMadden**

8:15 - 9:00 **KEYNOTE: Think Like an Explorer: Doing What Has Never Been Done Before**

One of last great mountaineering challenges was the Mazeno Ridge of Nanga Parbat. Over three decades international climbing teams had tried 10 times over and all failed. When Cathy O'Dowd's team set out to concur this mountain, many thought that the team wouldn't be any different, but it turns out they were. They were able to adapt when their plan came up against complicated unexpected reality. This keynote will explore the challenges of trying to do what has never been done before, examine the pitfalls of operating in an unpredictable and high-risk environment, identify the key challenges of building high performing teams amid a stressful project, actively engage the audience in expedition decision making processes, and help the audience concur their own challenges.

Cathy, O'Dowd, **1st woman to Climb Mt Everest from Both Sides and Author of** *Just For The Love Of It*

9:30 - 10:00 **Client Case Study**

Hosted by: **blueprism**

10:00 - 10:30 **Your Competitive Edge: Embracing "Customer Experience" Strategy for Shared Services**

Imagine a world where you were able to square the circle between customer service, colleague engagement and keeping your shareholders happy with re-engineering? Self-service, efficiency and speed. This session will talk about how we use a suite of different technology capabilities with process redesign to create outstanding customer service, efficiency, capacity and enhanced control.

John Standring, SVP & GM Global Servicing Operations, **American Express**

10:30 -11:30 **Demo Drive Raffle Prizes Announcement Break and Morning Coffee /Networking**

11:30 - 12:50 **Concurrent Track Sessions**
Click on one of the tracks below to view full session information

SHARED SERVICES ESSENTIALS	**ANALYTICS IN SHARED SERVICES**	**LATAM**
HR VISION	**WOMEN IN SHARED SERVICES**	

12:50 - 1:20 **The Great Debate: Sourcing in a Post-Automation World**

The economic environment has changed the decision-making process and criteria weighting for enterprises selecting between onshore shared services, offshore captives, and outsourcing alternatives. Enterprises planning and operating global business services must ensure that their work with oversees partners is not put at risk due to a sea of ever changing political and economic rulings that are shaping global trade. This keynote will examine how the current geopolitical landscape is affecting the sustainability of many traditional shared services and BPO sourcing relationships and the impact on domestic vs. offshored centers.

1:20 **Chairman's Close of Conference**

1:30 **Lunch**

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Additional Information on Concurrent Track Sessions

Planning & Launching | 3:10 -5:20

Tuesday, March 12th, 2019

3:10 - 3:50

PANEL: Stairway to Success: From Buy-In to Launch of Shared Services in 18 Months or Less

Time, resources and benefits will be at the core of a leader's decision to launch a SSO, because one must be able to connect the dots across the organization. What needs to prioritized to 'make the sale' in order to avoid failure to launch is essential.

In this session, participants will:

- Examine strategies for roll-out, creating value-add services, and creating better controls through multiple business units
- Explore strategies for implementation across function and regions
- Outline ways to build basic road maps, change management practices, savings plans, risk management plans, agility practices, and processes to achieve an SSO within 18 months

David Bedard, SVP, Finance Service Organization, **New York Life**

Charles Morgan, VP, Finance Shared Services, **Aetna**

Julie Harbert, VP, Shared Services, **Entergy**

3:55 -4:35

View on the Location Paradox: From Setup to Maintenance

Cost has been the primary measure of value in location decisions. However, the evolving political scene and impending tax regulations are changing the strategies that SSOs focus on when doing their due diligence. Location must be a competitive, environmental, cultural, and operational fit.

In this session, participants will:

- Discover the hot and new locations and whey the are gaining in popularity
- Examine why several SSO chose their location and the criteria used to make the decision
- Evaluate the role that operating conditions, talent availability, sustainability, access and physical infrastructure can play in decision making
- Identify hurdles, challenges and opportunities of immersing yourself in a different market and with different players

Sue Brauer, VP, Strategy Transformation, Finance Operations, **Pearson**

4:40 -5:20

Transformative Change Management: Overcoming Resistance through Co-Creation

A strong culture knows what the priorities and values are and lives by them. However, priorities and values sometimes need to change with the times. This can be even more challenging when you have a multi-function organization.

In this session, participants will:

- Examine ways to get buy-in from leadership and other teams to start the change process
- Explore structures and procedures needed to support the changes required
- Outline timelines and processes which are the most important when implementing change

Dan Melchior, VP of Global Enablement: Process & Capabilities, **McCormick**

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| PLANNING & LAUNCHING | EVOLVING | MATURING | SHARED SERVICES ESSENTIALS | DISRUPTIVE TECH | HR VISION |

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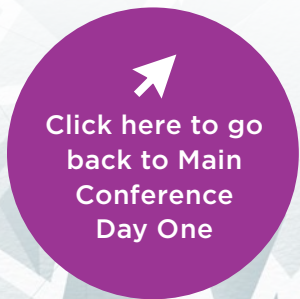
Additional Information on Concurrent Track Sessions

Evolving | 3:10 -5:20

Tuesday, March 12th, 2019

3:10 - 3:50

PANEL: Look Before You Leap: Defining Your Governance Structure for Today's Modern SSO

Disconnected. Isolated. These are not words that should be associated with escalation management in an SSO. Avoiding issues and conflicts starts with governance. So, what can be done to make sure there is clarity at the operational, management and strategic levels?

In this session, participants will:

- Review various SSO governance roles, standards, rules, responsibilities and power structures
- Outline new strategies to align initiatives and create a value chain as a beacon for process management
- Explore strategies to become a more agile organization amidst changes

Ken Somers, VP & Head of Strategy and Governance - Enterprise Shared Services at **XL Catlin**

Chad Keenen, Director of Shared Services, **Corning Incorporated**

Tom Nesteruk, EVP, Shared Services, **CACI**

3:55 -4:35

How We Can Use Theory of Constraints in a Shared Services Environment

Theory of constraints (ToC) was made famous by Eli Goldratt's book, The Goal, since the 1990's. ToC has been used to drive FLOW in many domains such as manufacturing plants, supply chain and large projects.

In this session, participants will learn how to use ToC practices to drive breakthrough results in shared services.

Yazdi Bagli, SVP, Global Business Services, **Walmart**

4:40 -5:20

Moving Farther Along the Value Continuum: How to Grow Your SSO from Single to Multi-Function

As organizations become more complex the need to cross collaborate and leverage resources becomes even more important. This is especially true when evolving from a single function to a multi-function SSO.

In this session, participants will:

- Explore ways to reduce complexity and respond faster through collaboration
- Dissect ways to further distinguish between commodity and strategic services
- Outline how to create economies of scale when developing new connections

Todd Blevins, VP, Shared Services, **UL**

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Maturing | 3:10 -5:20

3:10 - 3:50

Delivering Multi-Functional Shared Services: Agility & Customer Value as Growth Enablers

At J&J, they are building agility, accountability and excellent service to deliver healthcare to one billion patients, customers and consumers every day.

This requires the highest levels of operational agility, accountability and excellence in execution.

In this session, participants will:

- Explore how the world's largest and most diversified healthcare company is transforming its approach in order to deliver multi-functional services.
- Pave the way for transformation and establish a global shared services organization
- Identify how to support employees to embrace new ways of working
- Evaluate ways to adapt to market dynamics
- Dissect what value J&Js new model is delivering for its businesses, its 130,000 employees and its customers around the world

Erin Champlin, VP, Global Services & Enterprise Transformation, **Johnson & Johnson**

3:55 -4:35

BPO Status Check: Now and in the Future

Provide solutions towards cost reduction and profit optimization. This has been the traditional role of the BPO. Now, BPOs are providing assistance by understanding big data, analytics, cloud computing options and cost savings, enhanced automated systems, and providing even more elevated customer experience support

In this session, participants will:

- Examine how BPOs are leveraging technology to meet the needs of their clients
- Explore how SSOs are redefining their relationships with their BPO provider
- Identify what BPO 2.0 will look like

Michael Konstas, VP of Financial Shared Services, **American Express Global Travel Business**

Shadi Rezvan, Senior Manager of Shared Services & Transformation, **Twitter**

Bill Parker, VP, GBS, **AECOM**

4:40 -5:20

How to Drive a 10X Digital Transformation at Low Cost By Using Winning Ecosystems

Digital transformation is an opportunity of historic proportions in the context of the Fourth Industrial Revolution. Unfortunately, tactical issues such as the lack of resources and time seem to get in the way of leaders who are determined to drive change. This gap between intent and action continues to be as wide as ever. Tony Saldanha, a change leader and author with over three decades of experience, shares practical guidance from having successful driven transformation at extremely low cost at Procter and Gamble's best-in-class Global Business Services (GBS), among other Fortune 100 organizations. In this session participants will:

- Discover why digital transformations fail and what you can do about it
- Ensure that time and money are not on the critical path
- Review real-life success stories of 10X digital transformations in shared services
- Bridge the gap between successful pilot testing and deployment at scale

Tony Saldanha, Former VP, IT & GBS, **Procter & Gamble**

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Shared Services Essentials | 3:10 -5:20

Tuesday, March 12th, 2019

3:10 - 3:50

No Mandate, No Problem! Driving Successful Shared Services in an Opt-In Environment

Being able to demonstrate the value and sell the benefits of shared services is a challenge unto itself. Now, consider what it takes to have success in driving a shared services strategy in an opt-in environment.

In this session, participants will explore how to:

- Engage business unit leaders and sell the value of shared services
- Develop a disciplined centralization and process improvement methodology
- Leverage third parties effectively
- Establish key metrics and consistently upgrade them

David Evangelista, SVP & GM, **McKesson**

Amy Burns, Vice President Six Sigma, **McKesson**

3:55 -4:35

Unlocking Capacity: Bringing Non-Traditional Functions into Shared Services

Interested in what your peers are doing to sell more services? How they are combating a fear of job loss by adding more opportunities to create value in SS? This session will present ways to serve your customers outside of the traditional Finance, HR and other areas. By adding innovative, higher value and knowledge based processes – like those seen in sales and marketing, strategic sourcing, real estate and analytics – SSOs can create greater value, increase employee engagement contribute to enterprise wide decision support.

In this session, participants will choose a roundtable of choice and engage in discussion for expanding scope, where and when it makes sense.

Roundtable A: Sales & Marketing
Antoine Ezell, VP, Enterprise Capabilities & Solutions, **Eli Lilly & Company**

Roundtable B: Strategic Sourcing
Qiana Levy, Head of Global Procurement and Strategic Sourcing, **Learfield**

Roundtable C: Real Estate & Facilities Management

Roundtable D: Financial Planning And Analysis
Marianela Urgelles, Shared Services Director, **Intel**

Roundtable E: Legal Operations
Nitin Batra, Managing Director, Global COO, Legal, **Citi**

Roundtable F: International Mobility
Claudia Petrocchi, Head of International Mobility COE, HR Global Operations, **Ericsson**

4:40 -5:20

Making the Leap from Shared Services to Global Business Services

Many organizations are building their SSOs out, with the end goal of becoming a GBS organization. However, very few make it to full maturity.

In this session, participants will:

- Explore three stages of GBS evolution – from functional transactional excellence, to business service excellence, and to enterprise strategic enablement
- Examine what capabilities make a GBS world-class
- Outline how to successfully move your organizations from a mature SSO to a GBS
- Evaluate the most recent challenges that face GBS organizations and how to overcome them

Victor Susman, Senior Director, GBS, **Kimberly-Clark**

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Disruptive Tech | 3:10 -5:20

Tuesday, March 12th, 2019

3:10 - 3:50

Beyond the Buzz: Use Cases on Reshaping the Value of Shared Services with AI, Machine Learning & Cognitive Computing

Digitalizing and automating processes is the new normal for SSOs looking to add value and maintain a competitive edge in this 4th Industrial Revolution. Well beyond the proof of concept of RPA, we are focused now on scaling up, enhancing the CX and layering in AI to take RPA to new heights. We're even starting to see use cases of Machine Learning & Cognitive Automation in shared services. In this session, participants will:

- Hear how several SSOs are applying RPA, AI and other forms of advanced automation to SS processes
- Compare examples of where tech implementation fails and succeeds
- Examine where SSOs benefit the most quickly and obtain the greatest ROI
- Overcome resistance to change and gain buy-in

Mark Etwaru, Digital Transformation Leader, **Estee Lauder**

Jeff Machols, VP, Head of Continuous Improvements, **Voya**

3:55 -4:35

Process Mining for Shared Services: The Case for Double-Digit Savings & Speed to Market

Data science is the profession of the future, because organizations who are not able to use big data in smart ways will not survive. With that in mind it has become essential that shared services stakeholders are able to extract the information that will inform leadership to assist them in making strategic decisions for the entire organization.

In this session, participants will:

- Examine the three types of process mining – discovery, conformance and enhancement
- Evaluate how process mining can create a bridge between data minding and business process management
- Outline the initial steps to launch a process mining project in a structured manner
- Explore real-life applications of process mining

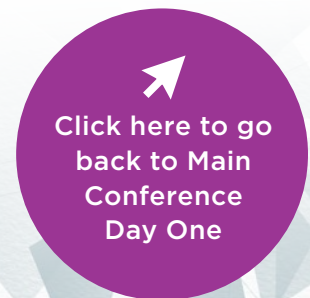Robert Bradfird, SVP, GBS, **Akzonobel**

4:40 -5:20

What Piloting Machine Learning Means for Shared Services in a Multi-Billion Dollar Industry

When combined together, AI and RPA create machine learning that has the ability to boost efficiency, improve productivity, provide essential analytics, and free up human work-force time to focus on value-adding activities like analysis, planning and decision making.

During this session, participants will:

- Hear how machine learning is driving continuous optimization and reinvention in SSOs
- Outline ways to create and pilot a machine learning project with the right tools and techniques
- Highlight which prescriptive analytics are proving to be most valuable within shared services
- Hear how learnings can assist management to act across a range of functions managed under SSO models
- Discover how machine learning is proving helpful in self-service learning, building frameworks and helping solve service problems

Satish Bengeri, Senior Director of Global Robotic Process Automation, **Cargill**

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Additional Information on Concurrent Track Sessions

HR Vision | 3:10 -5:20

Tuesday, March 12th, 2019

3:10 - 3:50

HR Your Way! Leveraging the Power of Personalization to Drive a Digital HR Transformation

Welcome to the consumerization of HR service delivery. New strategies are needed to reach and truly engage the current and up-and-coming workforce. Especially when tech is at the forefront of everyday interaction for customers. In today's digital environment, Shared Services has a huge opportunity to evolve the HR service delivery model and build capabilities among the team!

In this session, participants will:

- Learn where and how to start a digital HR journey
- Bring together social, mobile, analytics and cloud (SMAC) technologies to radically transform the employee experience
- Receive examples of personalized service delivery
- Balance high tech and high touch

3:55 -4:35

PANEL: Reaping the Benefits of Cloud Based HR Implementations

So many HR organizations are either evaluating or implementing cloud based apps for the massive benefits of simplification, enhanced employee experience and cost reduction. Yet, cloud-based systems also bring a host of challenges.

In this session, participants will:

- Highlight the opportunities and challenges of cloud-based HR systems
- Learn the best way to implement SaaS to meet business needs
- Ensure widespread adoption by employees
- Mitigate concerns with IT and security issues

Wendy Lucio, VP, HR Shared Services, **Southwire Company**

Kym Burke, Director HR Services, **The Mosaic Company**

Douglas Becker, Director of HR Technology, **Trinity Health**

Pam Velcheck, Senior Manager, HR Global Service Delivery Manager, **General Mills**
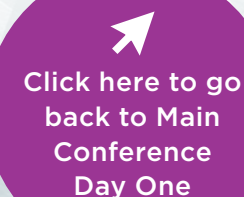
4:40 -5:20

Opportunities of AI/Technology in Hire-to-Retire

AI is changing the way work is being designed, completed and thought about – from recruiting, to employee management, to redeployment, to payroll, and even retirement. It's touching it all.

In this session, participants will:

- Explore how IA is and will change the way SSOs are looking at hire-to-retire
- Examine what SSOs need to know now to prepare for the future
- Hear how to use algorithms to find, recruit, engage, hire and retain talent better and faster than ever before

Tom Dewaele, VP, HR Services, **Unilever**

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Additional Information on Concurrent Track Sessions

Finance & Accounting | 3:35 - 5:35

3:35 - 4:05

Finding a Seat at the Table through Blockchain Implementation

Moving an organization from waiting weeks to settle payments to settling them in a matter of seconds could start the process of earning the ear of leadership. Additionally, it could assist the entire organization to addressing the mission and vision of their organization. Financial shared service leaders like the World Bank and CitiBank are doing just that right now with goal of better serving their customers and clients.

In this session, participants will:

- Identify how banks are experimenting with blockchain technology
- Evaluate the hurdles or challenges to implementing blockchain in an organization
- Dissect the initial steps to setting up blockchain transactions
- Examine the hurdles of breaking down silos to adopt blockchain

Ryan Davis, SVP, Procurement Management, **Bank of America**

4:10 - 4:50

PANEL: Is Your Finance Function Ready for Digital? How to Unlock Growth Potential & Drive Value

The finance function is transforming due to increased automation, strengthened data and analytics capabilities, and improved controls to support the strategic vision and direction of the business.

In this session, participants will:

- Examine existing F&A frameworks
- Explore the benefits of implementing new technologies into F&A
- Outline ways to leverage innovative frameworks to maximize F&A potential

Xavier Rodriguez, Global, Finance Shared Business Services, **Technicolor**

Daniel Davidson, VP of Finance Shared Services, **Equifax**

Mary Agoglia Hoeltzel, VP & Global CAO, **Cigna**

Kris Caskey, VP of Shared Services, **PGA Tour**

4:55 - 5:35

PANEL: Building a Lean Shared Services Financial Model

Do more with less. Find innovative strategies to cut costs. These are all typical drivers for F&A stakeholders. SSOs need to identify if tech, process improvements or process changes will bring the biggest success.

In this session, participants will:

- Outline where F&A is seeing the most ability to cut costs
- Define what strategies are providing the biggest ROI for F&A SSO
- Examine strategies to get a seat at the table through providing leadership with new strategies for success

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

Hosted By: **Nintex**

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HR Vision | 3:35 - 5:35

3:35 - 4:05

Talent Management: Six Strategies to Future-Proof Your Shared Services Workplace

To keep pace with rapidly changing business needs, SSOs are redesigning their talent management strategies and approaches. They are creating new opportunities to attract/retain the best possible talent, while balancing human and digital labor and resistance to change.

In this session, participants will:

- Highlight the developing career paths in shared services. How is automation opening opportunities for shared services and other parts of the business?
- Discuss strategies to hire/upskill talent. What are the new skillsets needed. Are SSOs utilizing the gig economy, creating CoE s for RPA and Analytics?
- Discuss the escalating problem of attrition. When you concentrate all your resources in certain centers, whether that be regional or global, you can often lose your ability to drive business acumen

Kris Ahrend, President of U.S. Shared Services, **Warner Music Group**

Chuy Michel, Director of GBS, **Herbalife**

Sue Dempsey, Senior Director, GBS Service Center Lead, KNA, **Kellogg Company**

4:10 - 4:50

PANEL: Finding Your Way Through the HR Analytics Maze

Shifts in the world of work are opening up exciting new opportunities – and challenges – for HR professionals. Being able to unpack the possibilities of people analytics, diversity and inclusion analytics, and even predictive analytics could mean the difference of success and failure for an organization.

In this session, participants will:

- Examine how analytics can boost hiring, management and retention
- Evaluate the innovative technologies being used by HR SSOs
- Dissect how what metrics HR SSOs are focused on

4:55 - 5:35

Key Considerations and Lessons Learned from Global Payroll Shared Services Leaders

Regardless of the methodology being used – a centralized system, a regional cluster or a capability-lead 'Center of Excellence' – payroll must be able to find a way to keep pace with the evolution of the business.

In this session, participants will:

- Examine continuous improvement strategies that global payroll SSCs are employing
- Evaluate how global payroll SSC are prioritizing their focus on technology, automation and standardization, aggregation, compliance, and co-location competencies
- Outline strategies to navigate acquisition and maintenance costs and concerns
- Review current KPIs that are in place – like on a balanced score card – to determine if new solutions process are needed

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softomotive
We talk automation

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Additional Information on Concurrent Track Sessions

Customer Experience | 3:35 - 5:35

Wednesday, March 13th, 2019

3:35 - 4:05

Customer First: Leveraging Front Office CX Strategies to Boost Back Office Service Levels

Developing a pleasant experience for a SSO customer should be at the center of every decision that is made. However, identifying what issues get prioritized can sometimes get derailed by other issues that arise. So, an SSO must expand, standardize, diversify and create new offering all at the same time.

In this session, participants will:

- Examine pitfalls project-based efforts around elevating customer experience
- Identify the proper channels for customers to improve the customer experience process
- Outline ways to engage the entire organization towards improvement and problem solving
- Evaluate ways to leverage front office strategies to leverage the back office service levels.

Richard Swan, President, **Koch Business Solutions**

4:10 - 4:50

Measuring Customer Success and Satisfaction in Shared Services

Are your services meeting or surpassing a customer's expectations? How do you know? Understanding and meeting the needs of customers is key to moving beyond the basics of service and expanding services – whether they are growth or investment related.

In this session, participants will:

- Examine case studies of organizations that are using in-app, post-service or email surveys
- Evaluate how you can use Net Promoter Scores to evaluate satisfaction
- Identify additional strategies for proactively interacting with your customers and continually humanizing your brand and showing you value a customer centric approach

Nadia DeVilla, VP, Head of Digital Transformation and Business Development, **Manulife**

Lisa Murphy, VP, Global Shared Services, **Whole Foods Market**

Pamela Wolfe, Chief, Enterprise Services Division, **NASA**

4:55 - 5:35

Embracing User Centric Design to Create a Culture of Continuous Improvement with Shared Services

Shared services leaders are often faced with a puzzle - how can I deliver excellent customer experiences and make users happy, while finding ways to be more efficient and deliver savings? In an industry where service excellence means everything, a focus on user experience can help, rather than hinder, shared services leaders in understanding their stakeholders needs. A user centric design can uncover waste and inefficiency, identify improvement opportunities, and enable more effective decisions, ultimately being more efficient. With the end goal of improving customer and stakeholder interactions with your Shared Services team we will highlight:

- What is user centric design and what difference can it make to Shared Services delivery?
- How can user experience mapping deliver insights and help create a culture of continuous improvement?
- What benefits can I expect, and how can I quantify the impact of a user centric continuous improvement approach?

Robert Phillips, AVP of Financial Shared Services and Continuous Improvement, **Canadian Tire Corporation**

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Additional Information on Concurrent Track Sessions

Intelligent Automation | 3:35 - 5:35

Wednesday, March 13th, 2019

Hosted by: AUTOMATION ANYWHERE Go be great.

3:35 - 4:05

Building & Scaling-Up Your Bot CoE

Bots have the ability to reshape the future of work. They can help with application processing, quote-to-case, procure-to-pay, data migration and entry, report preparation and much, much more. Now, there are great case studies of organizations that have imple-mented all types of bots.

In this session, participants will:

- Explore what are the most common types of bots to be implemented in SSOs
- Identify areas of opportunity related to bot implementation
- Dissect case study examples of how organizations evaluated the work they wanted bots to conduct
- Examine how shared services scaled up the work of bots

Gary Burke, VP, Finance Transformation, **Honeywell**

4:10 - 4:50

Bot Down! Developing & Implementing Your Crisis Management Strategy

Bots aren't perfect or all knowing. They can fail. It's well worth the time to do a risk assessment and father more tools to ensure that when the inevitable happens – or perhaps it already has – you are ready.

In this session, participants will:

- Evaluate the different ways that bots can fail
- Explore ways you can extract value from bot failure
- Examine strategies to get user feedback when a bot does not know an answer
- Outline ways your SSO can communicate and leverage existing customers to get feedback before an incident happens

4:55 - 5:35

12 Lessons Learned from 12 Months of RPA Engagement

Millions of dollars have been spent by shared service organizations to implement RPA (Robotic process automation), and now organizations are seeing their ROI and identifying key learnings. This means those that are thinking about implementation or are in the process of implementation have a lot they can learn about it what models work, how to meet or exceed expectations, and even know what technology to use.

In this session, participants will:

- Dissect what success and failure looked like when implementing RPA
- Outline strategies for getting internal buy-in from key stakeholders when implementing this technology
- Evaluate the ROI of setting up bots in an organization
- Identify the next steps on the tech roadmap once RPA has been implemented

Kristin Deegan, VP, HR Shared Services and Technology, **Cox Automotive Inc.**

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Thursday, March 14th, 2019

Shared Services Essentials

11:30 - 12:50

11:30 - 12:10

The Best of Both Worlds: Ways SSOs Create Value During M&A

Accelerated de-duplication, accelerated revenue synergies, enhanced customer retention, early engagement of operational expertise, reduced operational risk, and a reliable and proven path to follow are all values that SSOs can create during M&As.

In this session, participants will:

- Evaluate how SSOs is uniquely positioned to assist during M&As
- Explore what the most common challenges are for an SSO during M&As
- Identify what processes are essential to have in place during a M&A

12:10 - 12:50

Rotate 90 Degrees: Change Your Point of View from Vertical Functions to Horizontal Processes in Order to Define, Design, and Deliver End-to-End Processes

Many of us have been exposed to the Lean Six Sigma idea of flow...one of the core principles for operational excellence. Hand-offs between people or departments are the enemy of flow and greatly contribute to inefficient and ineffective processes. But even in our global, cross-functional, process-oriented world, functional hierarchies continue to dominate organizations. While most project teams are cross-functional, few operations team are. Shared Services is the perfect opportunity to rotate your organization to create & sustain end-to-end processes.

- See how a process view changes everything
- Learn from practical examples that most companies experience
- Develop a vision for creating sustained success with your end-to-end processes

John Sparks, Senior Director, Shared Services Operations & Implementation, **World Vision**

➤ Click here to go back to Main Conference Day Three

Analytics In Shared Services

11:30 - 12:50

11:30 - 12:10

PANEL: Mastering Data and Not Letting Data Master You

The implementation of technology has resulted in large amounts of data being available to organizations. These data points could potentially help a shared service organization get a seat at the leadership table.

In this sessions, participants will:

- Identify the most effective ways to gather and synthesize data in a shared service organization
- Explore what data provides the best ROI
- Outline quantitative techniques on how to use data to predict future scenarios
- Evaluate where they stand on the analytical data maturity scale

Sue Danino, Vice President of Finance, **Hubbell Incorporated**

Kristin White, Senior Director of Financial Controls and Risk Management, **Cisco Systems**

John Transier, SVP, Finance, **Harland Clarke**

12:10 - 12:50

How One Company Used Analytics to Move Shared Services and GBS Up the Value Chain

A study from Deliotte in 2015 said, "65 percent of SSCs said they are investing in building analytics capabilities and will offer Insight Services by 2018." If anything, it seems that this trend will continue for a long time into the future, and it's important that evaluate you are able to move your SSC from conducting bit sized projects, where you are building knowledge in a 'safe environment' to full scale implementation.

In this session, participants will:

- Evaluate case study examples of how organizations are using analytics as a centralized function
- Examine how to make your SSO an insight driven organization to support the front-line with back-office data
- Assess how you can use data across multiple towers – like finance, HR and procurement – to deliver great insights

Chris McCann, Director of Strategy and Enablement, Global Business Services, **Bose**

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SHARED SERVICES ESSENTIALS

ANALYTICS IN SHARED SERVICES

LATAM

HR VISION

WOMEN IN SHARED SERVICES

Additional Information on Concurrent Track Sessions

LATAM

HR Vision

Thursday, March 14th, 2019

11:30 - 12:50

11:30 - 12:50

11:30 - 12:10 | **PANEL: Latin America Cultural Differences & Opportunities**

Highlight the leading economic and political issues affecting the SS&O industry in Latin America

- Explore the current level of maturity of the Latin America market and examine how -and if - the economic instability is impacting upon operations in the region
- Hear how SS leaders in the LATAM region can effectively enable trust in organizations

Juan Araya, Senior Lead, CoE, LatAm, **Uber**

12:10 - 12:50 | **How to Think Like a Start Up & Use Alliances & Partnership to Scale Like an Enterprise**

A successful HR pilot could result in full company implementation, happier customers, and cost savings. The failure of a pilot could mean wasted money and time. In this session, participants will:

- Explore how to measure shared services readiness to pilot and what tools are most effective
- Identify major points of failure that can take place when launching HR shared services
- Measure the success of technology implementation
- Outline how your organization can win with strategic alliance partnerships

Christian Yllescas, Business Service Head for the Americas, **LEDVANCE**

11:30 - 12:10 | **Agile HR: Utilizing Case & Knowledge Management to Deliver Next-Generation HR Shared Services**

Utilizing new human resource technologies to give your employees best-in-class services quickly and conveniently is a focus of many a HR shared services stakeholder.

In this session, participants will:

- Evaluate the benefits of new technologies and downfall of these new technologies
- Explore how to manage the digital workplace with HR Case & Knowledge Management software
- Examine the benefits of including enhanced HR efficiency, knowledge capture and improved ser-vices in a SSO strategy

Quasar (Q) Hamirani, Head of People Operations, **Airbnb**

12:10 - 12:50 | **Harnessing Digital Innovation & Enablement in HR**

This session will present a successful journey of transformation ignited by HR, which has resulted in a thriving organization that has attained financial growth year after year. Through principles of organizational development, upgrading talent, creating accountability throughout the organization, and culture change, this business transformation has reduced costs, provided laser focus on key business initiatives, and created a world class leadership team.

- Align HR with the company's global mission and strategic plan
- Ensure internal buy-in and establishing key milestones
- Increase employee engagement by placing employees at the heart of the mission
- Receive implementation strategies that support a commitment to diversity, career growth, winning in the marketplace, problem solving and more

Click here to go back to Main Conference Day Three

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Additional Information on Concurrent Track Sessions

Women In Shared Services

Thursday, March 14th, 2019

11:30 - 12:50

11:30 - 12:10

PANEL: Recruiting, Developing, Retaining – and EMPOWERING - Female Leaders

In a widely publicized initiative few years ago, eBay embarked on a journey to bring more women into its top ranks. Senior executives at the firm discovered the investment yielded substantial bottom-line and cultural benefits. Despite these findings there are still far too few women gaining entry into the C-suite. It appears a contributing factor to this reality is that women are not receiving enough opportunities to gain the key work experiences viewed as necessary to gain entry into the C-suite.

In this session, participants will:

- Examine how companies are identifying and empowering high powered women
- Outline the contributions and cultural benefits of promoting talented women
- Evaluate how to embark on a continuous plan to close the gender gap

Cindy Gallagher, CEO, **LibertySource**

Marcia Moran, VP, Global Finance Shared Services, **Mylan**

12:10 - 12:50

The Path Less Traveled: How One F500 Shared Services VP Achieved Success Unconventionally

- Highlight one of your biggest mistakes. What could you have done differently?
- Describe your career path, how did you get where you are, and what continuing education opportunities are you personally taking advantage of?
- What's your advice for impressing the CFO/CEO? Any advice on how to improve the chances of getting a raise and promotion?
- Talk about the worst job you've had. How did you endure?
- Who has made it possible to access the technology you need to be successful?
- Discuss the emerging skill sets for tomorrow's Female Shared Services Leaders

Click here to go back to Main Conference Day Three

Interactive Discussion Groups

CHOOSE 3 TOPICS. ROTATE BETWEEN EACH CHOICE EVERY 30 MINUTES. ONLY 20 ATTENDEES PER IDG.   **Wednesday, March 13th at 10:45 to 12:25**

IDG 1 — Sold Out in 2018!
Is Your Talent Ready for Digital?

IDG 2
Measure What Matters: Reassess Your KPIs for Ultimate Performance

IDG 3
Next Generation Travel & Expense Management

IDG 4
Business Continuity Planning (BCP)

IDG 5 — Sold Out in 2018!
Change Management: Morphing into a Beautiful Butterfly

IDG 6
Please Take a Seat at the C-Suite Table

IDG 7
The Changing Value Proposition of Outsourcing

IDG 8
Stop Herding Cats and Start Managing Your Vendors Effectively

IDG 9
Using Design Thinking for Business Process Innovation

IDG 10
Hack the Bot, Don't Let the RPA Bot Hack You

IDG 11
Process Mining for Process Efficiency

IDG 12 — Sold Out in 2018!
Destination RPA Center of Excellence

IDG 13
Strategies for Designing Global Payroll

IDG 14
Benefits of Blockchain Applications Across O2C, RTR & PTP

IDG 15
Developing Global Process Owners

IDG 16
HR Excellence: Driving a Fanatical Focus on Employee Experience via Self-Service

IDG 17
High-Performance Record to Report

IDG 18
Branding Your SSO to Attract and Retain Talent

IDG 19
The Future of Procure to Pay

IDG 20
Evolution of Order to Cash

IDG 21
The Latin America Shared Services Landscape

IDG 22
What Artificial Intelligence Can Do for Shared Services Processing

IDG 23
GDPR Impact on Global Services Delivery

IDG 24
Analytics Market Evolution & Trends

IDG 25
Mobile as a Platform for Digital HRSS

IDG 26
Using AI Chatbots in HR Shared Services

IDG 27
Commercializing Shared Services via Carve-Outs

IDG 28
The Growth of Digitally- Enabled Global Business Services - Are We Really Making Headway?

IDG 29
Evolving Your Master Data Management Strategy

IDG 30
Using Business Process Management (BPM) Tech to Manage Workflow & Track Data

IDG 31
Building a Latin America SSO

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SSOW 2019 is letting you be a kid again!

Book Signings

Don't forget to meet our authors and grab a signed copy of their book.

The Work Hard, Play Harder Expo Hall

Take a break from the hustle and the bustle of our 60+ sessions in the Work Hard, Play Harder Expo Hall! This is where you can not only recharge with a quick massage, but blow off some steam with games guaranteed to make you nostalgic for when playing during recess was an every day experience! So in between visits to our 70+ provider showcases, make sure to uncover all the surprises we have in store!

The Rest Nest

Do you need a nap after so much hard work? We wish! But this is the next best thing. Feel the stress of the excitement melt away with a massage, or take a load off and literally smell the fresh flowers while gazing into our relaxation fountain. You'll feel rejuvenated and ready to take on the next hours of quality content!

The Imagination Station

Let your creative juices run wild! Build your dream machine with our Lego™ station, draw on our design wall, or just sit with a colleague and consider all the new things you've learned during sessions in the midst of our colorful creations!

Impact Awards And Gala

Apply for the SSON Impact Awards or join us to see who is making the biggest impact in shared services today.

The Playtorium

Let your inner child and your competitive spirit out! Everyone loves a good game and this is where the fun begins. From Cornhole to giant Connect 4, you'll have a blast beating your competition!

Welcome Mixer!

Come and grab a cocktail, network with early arrivals and enjoy the fiesta.

Demo Drive And Raffle

Meet with best-in-class service providers and win top-notch prizes.

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REMINDER: You don't need to register to apply!

Take this Opportunity to Tell Us What Impact Your SSO is Creating!

Applications Open:
October 15, 2018 –
Email geena.monaco@iqpc.com
for more information on how to apply.

Applications Deadline:
December 31, 2018

Finalist Decisions:
January 14, 2019

Awards Gala:
March 13, 2019

Change Management Impact Award

Regardless of where your organization may be on the maturity spectrum of shared services, change is a constant, and the ability to manage change as part of your day-to-day operations is crucial to ensure the cultural transformation needed for execution and growth.

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This award category is focused on the strategy, improvement methodology, employee engagement techniques, benefits, and hard improvements that a shared services organization have made to navigate through change.

Process Improvement & Value Creation Impact Award

Process improvement can take many forms: Eliminating waste in operations, eliminating friction points for customers, process redesign as part of six-sigma, innovations in process outcomes or even training related processes. Value creation means delivering shareholder value in terms of either top-line growth, bottom-line improvements or even experience related value.

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This award category is focused on the strategy, improvement methodology and benefits/hard improvements in process improvement and value creation that have been made by a shared services organization

Customer Centricity Impact Award

As customer expectations and behaviors have caused seismic shifts across entire industries and business models, companies have enhanced their focus on customer experience through front, middle and back office processes. This category will focus on how business services utilizing traditional Customer Experience (CX) tools – e.g. journey mapping, design thinking – to achieve a consistent and seamless experience across all of the touchpoints with both internal and external customers.

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This award category is focused on the strategy, methodology, benefits, and hard improvements a shared services organization have made to improve the focus on the customer.

Business Transformation Impact Award

Today's shared services operating models are the engine behind transformation. As companies transform themselves along the key pillars of the 21st Century Enterprise - Customer Engagement, Changing Nature & Value of Assets, Everything-as-a-Service and Workforce of the Future - how are companies successfully leveraging the Business Services operating model to advance the 21st Century Enterprise Operation Model?

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This award category is focused on the strategy, improvement methodology, benefits, and hard improvements that have been made by shared services organization.

Automation Impact Award

Automation can take many forms, movement to workflow technology, self-service system, Robotic Process Automation and even in some cases Artificial Intelligence, the options are endless.

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This award category is focused on the strategic automation methodology that is being used, benefits, and hard improvements that the automation have brought to a shared services organization.

Hosted By:

AUTOMATION ANYWHERE *Go be great.*

Creative Talent Management Impact Award

Managing talent effectively is a major challenge at every SSO. Coupled with the digital age now redefining business roles, SS leaders are being asked to expand their existing competencies with in-depth knowledge of technology and analytics, as well as broader leadership and business partnering skills.

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This award category is focused on the strategy, skill sets, improvement methodology, the rise of digital talent, benefits, and hard improvements that a shared services organization have made to talent management.

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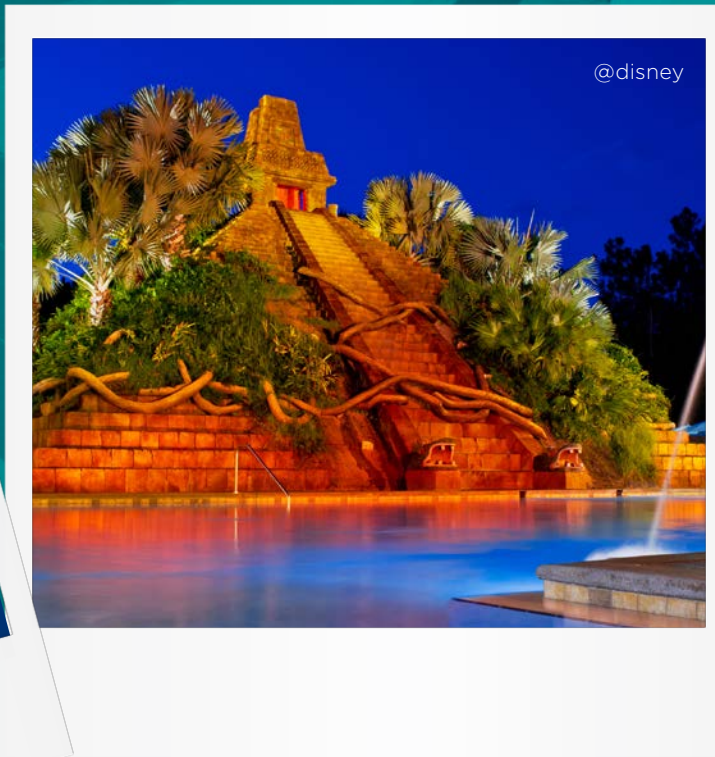
SSOW Orlando will be hosted at Disney's Coronado Springs Resort! Disney created this resort with Spanish Colonial Mexico in mind and it will not disappoint. With a beautiful pool equipped with a waterslide, delicious cuisine ready for you to enjoy at the Maya Grille, and of course the best part, the La Vida Gym and Spa where you can relax after a day at the event.

For more details, visit our **venue page here.**

SPECIAL ROOM RATES AVAILABLE

Group Rate: We've negotiated a discounted hotel room rate of $219.00 per night + 12.5% tax specifically for SSOW attendees

How to Book: To book your room, please identify you are part of the IQPC SSOW 2019 group to ensure the special rate (based on availability). The group rate is available three days pre and post event based on group rate availability. Please make your reservation before Friday, February 15th, 2019 in order to ensure you are eligible for the group rate. After Friday, February 15th, 2019, hotel rooms will be offered on a space-available basis at the prevailing rate.

Reservations Phone: (407) 939-4686
Reservations Link: http://book.passkey.com/go/SSOW2019

THE WORLD'S LARGEST SHARED SERVICES & OUTSOURCING NETWORK

The Shared Services & Outsourcing Network (SSON) is the largest and most established community of shared services and outsourcing professionals in the world, with over 120,000 members.

Established in 1999, SSON recognized the revolution in business support services as it was happening, and realized that a forum was needed through which practitioners could connect with each other on a regional and global basis.

SSON operates under two distinct brands, each offering shared services professionals the information, tools and connections they need to do their jobs.

SSON is a one-stop shop for shared services professionals, offering unrivalled learning and networking opportunities both face-to-face and online through:

- Surveys, reports and white papers
- Online events and webinars
- Vendor directory
- Jobs board
- 40+ industry leading events across the world
- SSON Excellence Awards Program
- Cutting edge editorial and industry news
- Exclusive interviews with industry leaders

SSON | Free Online Events

SSON is delighted to deliver free online events about the latest shared service topics for our members, including:

Powered By:

VISUAL DATA INSIGHTS FOR SHARED SERVICES & OUTSOURCING

SSON Analytics is SSON's global data analytics centre, offering visual data insights that are simple, accurate, and digestible to the global shared services and outsourcing community, through a variety of tools and reports:

- **Visual Analytics Workbooks** present data in easily digestible visual formats to help you make decisions about your shared services organization as they shed light on current trends.

- **Customized Data Products –** Shared services data tailor-made to your specifications. If you can't find the answer to a particular question, ask us!

- **The SSON Analytics Blog** features commentary on all of our latest research findings. Updated weekly, make sure you stay ahead of the industry developments.

- **Data Tools:**
  - **Metric Benchmarker –** Benchmark your SSO across 31 metrics against 2 different data sets, from industry function to cost of living.
  - **Intelligent Automation Universe –** A database of software vendors that provide technology within the RPA to AI spectrum to business support services. Explore their customer footprint and the number of IA projects worldwide.
  - **City Cube -** Compare shared services locations around the world across a variety of metrics.
  - **Shared Services Atlas -** Locate shared services hotspots around the world at country, state and city level from our global database of 7800+ delivery centres.
  - **SSON Salary Index –** Wondered how much your shared services peers are earning across the world or in your own city? Find out with our crowdsourced salary benchmarking tool.

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None of the packages include the Awards Gala Dinner. Passes are only available a-la-carte

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Main Conference	$4,799 | **Save $600**	$5,399

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Awards Gala Table (Table of 10)	$2,000

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