INTELLIGENT AUTOMATION
CHICAGO **2017**

July 31 – August 2, 2017 | Radisson Blu Aqua Hotel, Chicago
www.IntelligentAutomation.iqpc.com

Reshaping Business Processes

RPA ▪ COGNITIVE ▪ AI
F&A, HR, CALL CENTERS & MORE

CHAIRWOMAN WELCOME LETTER

Welcome to the **Intelligent Automation** conference! It's my great pleasure to be serving as Chairwoman at what I know will be an exciting and valuable event.

Two years ago, SSON held its first annual conference in the U.S. on the topic of RPA in Shared Services. The topic was so new that the industry didn't yet know what to think of it. Fast forward to 2016 and the second event sold out. In fact, such was the level of interest that SSON quickly responded and organized a second conference before 2016 was out. Both were oversubscribed; more importantly, they both received amazing attendee feedback.

The two SSON RPA conferences NelsonHall chaired in 2016 provided excellent lessons from organizations that were actively undertaking RPA projects. These included valuable "dos and don'ts" for each stage in the RPA lifecycle. For organizations just embarking on RPA, the guidance covered topics such as:

- Preparing a communication plan
- Establishing a governance framework for RPA project assessment
- Establishing a RPA Center of Excellence, including a centralized RPA & tool technology evaluation group, a best practice group for establishing standards, and IT liaison personnel
- Working with the IT organization, e.g. in establishing a framework for allocation of IDs to bots and in change management.

The conference you will be attending in July will **go beyond RPA to look more broadly at intelligent automation**, including the application of cognitive technologies for handling unstructured data and for less rules-based activities. Organizations' demand for useful, hands-on advice on topics such as the art of the possible with RPA and with intelligent automation, on examples of emerging best practices in terms of approach, on lessons learned by early adopters, and so on, remains very hot.

So, what can you expect to gain from attending the **Intelligent Automation** conference in July?

- Insights on both current trends with the application of RPA and more cognitive tools, and ways in which these technologies are going to impact your organization in both the near and the mid-term
- 101 Workshops that will appeal to RPA/intelligent automation novices or 501 Master Classes for those who are more advanced
- Networking with executives focusing on different functional areas – with tracks on F&A, HR and call centers
- Advice on topics such as selecting appropriate business models for your organization when applying intelligent automation, best practices in change management, and in rolling out a program. And you will hear examples of the application of AI & cognitive technologies and use of predictive analytics from a broad range of industries and backgrounds

As the IA Chairwoman, I promise you will have plenty of opportunities throughout the three days to interact with the experts presenting, and with other attendees.

We look forward to seeing you in Chicago!

Sincerely,

Rachael Stormonth
Executive Vice President
NelsonHall

Jules Miller
Conference Director
SSON North America

Heather King
Divisional Director
SSON North America

WHO ATTENDS

- Finance
- Operations
- Shared Services
- Call/Contact Centers
- Global Business Services

- Business Process Improvement
- Customer Delivery/Loyalty
- Operational Excellence/Process Optimization
- Continuous Improvement
- RPA, Artificial Intelligence, Digital & IT

- Procurement
- Business Process Innovation/Transformation
- HR Operations
- Corporate Strategy
- Global Process Owners (P2P, R2R, O2C, T&E)

A FEW OF OUR PAST ATTENDEES INCLUDE

FROM ALL AROUND THE WORLD, INCLUDING:

- Australia
- Brazil
- Canada
- Colombia
- Costa Rica
- Estonia
- Guatemala
- India
- Japan

- Mexico
- New Zealand
- Poland
- South Africa
- Sri Lanka
- Turkey
- United Kingdom
- United States
- Germany

TO VIEW A FULL BREAKDOWN OF ATTENDING COMPANIES AND DEMOGRAPHICS

CLICK HERE

AIG

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

- Vice President of Finance Lead and Global Operations

Citi

"Highly educational. It has been a fantastic opportunity to learn how others in our industry are leveraging RPA."

- Senior Vice President, Process Optimization Director

NEW YORK LIFE

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

- Corporate Vice President

Nasdaq

"I was looking for an overview, introduction and applicability of RPA. I got that."

- Senior Vice President, Global Client Relations

GM

"Good content and great opportunities to meet colleagues who are on the same journey as us."

- Global Manager, Global Business Services

Take a look at all that our attendees had to say, HERE ▶

BOTS BOARD

Jason Barkham
Vice President, Business Transformation Solutions
WARNER BROS. ENTERTAINMENT INC.

AJ Bernstein
Senior Director, Financial Shared Services
LINKEDIN

Paul Bartley
Director Global Shared Services
BD

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

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

Curt Burghardt
Senior Director HR Shared Services
WALGREENS

Jim Walker
Shared Service Portfolio Manager
NASA

Henry Lyles
Director, Global Business Services Data Excellence & Automation
MCDONALD'S CORPORATION

KEYNOTE SPEAKER

Jon Theuerkauf

Managing Director, Head of Performance Excellence, Robotic Process Automation COE Program Head

BNY MELLON

Session: THE ART OF THE POSSIBLE

SPEAKING OPPORTUNITIES

If you, and/or your organization have an intelligent automation story to share and would like to be included in our impressive list of 2017 speakers, contact Jules Miller, Conference Director, at jules.miller@iqpc.com

CONTACT US >

FEATURED SPEAKERS

Rohit Amberker

Director, Royalties and Content Operations

Microsoft

Amir Issaei

Operations Research & Advanced Analytics

American Airlines

Alok Bothra

Director, Robotic Process Automation & ECM Champion

Capital One

FEATURED SPEAKERS

Sreeharsha Upadhyayula
Vice President & General Manager
SEARS HOLDINGS

Troy Shaffer
Vice President Call Center Operations
scan HEALTH PLAN

Jeff Brown
HR Service & Operations Director
MARS

SPEAKER FACULTY

Don Alexander
Senior Director,
Commercial Bank
Capital One

Brandon Halbert
Director of Strategy &
Operations
Campbell Soup Company

Kelly Switt
Senior Vice President,
Process Optimization
Director
Citi

Lee Coulter
Senior Vice President,
Ascension & Chief Executive
Officer
**Ascension Shared
Services**

David Marckel
Vice President, Information
Systems - Technology
Shared Services
**BlueCross BlueShield of
Tennessee**

David Kapauan
Distinguished Architect
- Contact Centre
Technology, T&O
Royal Bank of Canada

Sal Novin
Assistant Vice President,
Head of HPA Service
Business Unit
Cognizant

Margaret Kilian
Director, Global Process
Expert, Record-to-Report
UCB, Inc.

Christina Paulausky
Senior Manager,
HR Shared Serves
Walgreens

Andrew Gurbaxani
PMP, PMI-ACP, Vice President
of Analytics & Networking
Benevis

SPEAKER FACULTY

Rachael Stormonth
Executive Vice President
NelsonHall

Russ Gould
Senor Director, Product Marketing
Kofax, Inc.

Mark Davison
Partner - Robotic Process Automation
Information Services Group (ISG)

Nicolette Harper, M.B.A.
Worldwide Director of Retail Channel Digital Marketing
Microsoft *(invited)*

Greg Fritsky
Director of Finance Transformation
Redwood Software

Edward Hansen
Partner
Morgan, Lewis & Bockius LLP

Pat Geary
Chief Marketing Officer
Blue Prism

Keith Farley
Director, Innovation & Customer Experience
Aflac *(invited)*

Scott Furlong
Partner
Information Services Group (ISG)

Carlos Aguirre
Global Manager, Business Process Intelligence & Enablement
General Motors *(invited)*

SPEAKER FACULTY

Marios Stavropoulos
Chief Executive Officer
Softomotive

Todd Dooley
Vice President, Finance,
Productivity & Operations
H&R Block

Peter Lowes
Partner & Co-Head of
Robotics & Cognitive
Automation
Deloitte Consulting

Sean Sperling
Director, Claims
Administration
Priority Health

Chas Moore
Managing Director, North
America (West)
Chazey Partners

Phil Searle
CEO & Founder
Chazey Partners

Daniela Henriques
Vice President, Business
Process Transformation, US
& Canada
Softtek

Sridhar Rajan
Principal
Deloitte Consulting LLP

Dr. Michael Hites
Senior Associate Vice
President for Administrative
Information Technology
Services (AITS) & Chief
Information Officer
University of Illinois System

"Very well
structured
in terms of
content and
speakers. It was
a worthwhile
investment for
me."

- General Manager,
MAS Legato Pvt Ltd

PRE-SUMMIT WORKSHOPS | MONDAY, JULY 31, 2017

8:00am | **REGISTRATION FOR WORKSHOP A & MASTER CLASS A AND NETWORKING BREAKFAST**

RPA 101	MASTER CLASS 501
8:45am — **WORKSHOP CHAIRPERSON'S OPENING REMARKS**	**MASTER CLASS CHAIRPERSON'S OPENING REMARKS**

9:00am

WORKSHOP A: IDENTIFY, PRIORITIZE & IMPLEMENT A SUCCESSFUL INTELLIGENT AUTOMATION PILOT PROGRAM

In the RPA, Cognitive, and AI spaces (collectively called Intelligent Automation or IA), the saying "you must walk before you can run" is very relevant. IA is a valuable tool for a wide variety of processes, functions and organizations, but it is a new area of expertise for most leaders. Fortunately, IA lends itself very well to a pilot program approach, providing a way forward for decision-makers with a significant ROI supported by a modest investment, short time frames, and minimal operational exposure.

Join this workshop to understand the definitions, context and evolution of RPA and IA that leaders need to understand before embarking on an IA initiative. We will demonstrate tools to prioritize and plan for those opportunities, so that you can gain the support of management and move to implementation. We will finish the workshop with IA case studies showing how automation can be leveraged, including in the most "barren" technology landscapes.

In this workshop, we will discuss:

- IA case studies involving a range of scope and maturity in processes and technology
- Developing the IA road map with a supporting business case, including how IA pilot programs can be standalone initiatives or incorporated within a larger transformation program

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

Robert Towle, Managing Director - North America (East), **Chazey Partners**

MASTER CLASS A: HOW TO DEVELOP & MANAGE A SUCCESSFUL INTELLIGENT AUTOMATION CENTER OF EXCELLENCE (COE)

This deep dive session is designed for organizations that are either ready to develop an intelligent automation CoE or would like to learn more about how to enhance their CoE operations on a wide variety of levels.

In this session, we will discuss how to establish (or enhance) an effective governance and centralized structure to support your organization's intelligent automation CoE initiatives — as well as learn about:

- How to establish and manage an effective intelligent automation roadmap
- Effective CoE and governance process models
- Methods to successfully develop and manage effective change management initiatives - and effective PR, marketing, and communication plans

* Boxed lunches provided to all Master Class A attendees.

10:45am | **REGISTRATION FOR WORKSHOP B & MORNING NETWORKING BREAK**

11:00am	**WORKSHOP B: HOW TO DEVELOP AN EFFECTIVE CALL-TO-ACTION INTELLIGENT AUTOMATION PROOF OF CONCEPT (POC)** Before you can roll out an intelligent automation program, of course you need to develop an effective PoC that warrants your stakeholders' attention and approval. However, if you're new to the intelligent automation scene, doing so can be quite a challenge. Many organizations waste very valuable time on developing a PoC, when it's not necessary to do so. You can develop an effective PoC in just a few weeks versus months and in this Workshop you will learn how. In this workshop, we will discuss such topics as: ▪ How to develop a clear-cut presentation of your intelligent automation goals, objectives, scope, and success criteria ▪ Examples you should include in your PoC that reflect the successes other organizations have experienced with their intelligent automation roll outs ▪ How to develop a call-to-action implementation roadmap, identify key projects, KPIs to be met, and how to track your success along your journey ** Boxed lunches provided to all Workshop B attendees.* **Daniela Henriques**, Vice President, Business Process Transformation, US & Canada, **Softtek**	**MASTER CLASS A: HOW TO DEVELOP & MANAGE A SUCCESSFUL INTELLIGENT AUTOMATION CENTER OF EXCELLENCE (COE)... CONTINUED**
12:45pm	**REGISTRATION FOR WORKSHOP C & AFTERNOON NETWORKING BREAK**	**REGISTRATION FOR MASTER CLASS B & AFTERNOON NETWORKING BREAK**
1:00pm	**WORKSHOP C: INTELLIGENT AUTOMATION BOOT CAMP** While RPA has been the buzzword for the past few years, as the discussion has moved forward, it has become clear that the question of "Is it just hype?" has been laid to rest. Instead, the question is "How far can RPA, cognitive and AI technologies take your organization toward process optimization? This Boot Camp will discuss vital questions that need to be answered with respect to what is involved in establishing an intelligent automation program, including: the benefits it can provide to a variety of industries and corporate functional departments, the roadblocks to its success and its potential to add value to your business. By attending this workshop, you will: ▪ Learn about Intelligent Automation's current and ever-evolving capabilities and what it can offer in the years to come ▪ Better understand which processes can utilize said technologies and how are they different from other automation management tools ▪ How to plan and implement a successful Intelligent Automation **Jordane Elmassian,** Vice President, Analytics & Automation, Shared Service Center, **MasterCard**	**MASTER CLASS PART B: HOW TO SCALE-UP AN INTELLIGENT AUTOMATION PROGRAM & ENSURE CONTINUED GROWTH** This deep dive session is designed for organizations that would like to learn more about how to effectively scale-up their pre-existing intelligent automation program/s. ** Boxed lunches provided to all Master Class 2 attendees (a working lunch).* **Scott Furlong**, Partner, **Information Services Group (ISG)** **Mark Davison**, Partner - Robotic Process Automation, **Information Services Group (ISG)**
2:45pm	**REGISTRATION FOR BONUS ROUND WORKSHOP & AFTERNOON NETWORKING BREAK**	

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3:00pm

BONUS ROUND WORKSHOP: HOW CAN ENTERPRISE ROBOTICS REMOVE MANUAL ACTIVITIES FROM FINANCIAL OPERATIONS & ULTIMATELY REMOVE STRESS FROM YOUR PERIOD-END CLOSE?

Learn how knowledgeable bots can replace significant parts of the manual efforts across your entire finance function departments. The latest bots know how to perform all the manual financial and accounting tasks and controls and complete documentation & maintain an audit trail. They interact with approvers and supervisors when needed and always provide a dynamic dashboard of global progress.

By attending this workshop, you will learn:

- How bots with built-in process IP can replace your current manual effort
- How this next generation of knowledgeable bots can completely revolutionize your delivery capabilities

Greg Fritsky, Director of Finance Transformation, **Redwood Software**

REDWOOD®

4:45pm

IEEE'S INTELLIGENT AUTOMATION STANDARDS REPORT

Feel like you are living in the tower of Babel when you talk about Intelligent Automation? Would some common definitions be helpful? How about a technology taxonomy and standardized feature and functionality set?

Come learn what we are doing to bring some sanity to this rapidly accelerating space. Starting in late 2015, a group began working with IEEE to start establishing standards. Standards are proven innovation accelerators. Once we can talk together and work together, problems only have to get solved once and groups can work together for fundamental advancement. Get a sneak peek at the first standard being published in June and see the roadmap of future standards efforts moving forward.

Lee Coulter, Senior Vice President**, Ascension** & Chief Executive Officer, **Ascension Shared Services**

5:30pm

CLOSE OF WORKSHOPS 101s & MASTER CLASSES 501s DAY

6:00pm

NIGHT ON THE TOWN EXCURSION

Meet at the hotel bar at 6:00 pm so we can venture off as a group for a night on the town!

MAIN CONFERENCE: DAY ONE | TUESDAY, AUGUST 1, 2017

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

8:45am

CHAIRWOMAN'S OPENING REMARKS

Rachael Stormonth, Executive Vice President, **NelsonHall**

9:00am

KEYNOTE ADDRESS: RPA: RESULTS, NOT RISK

You've spent millions in licensing, infrastructure, hiring, training, and consulting— all that, and you're now about to start the most high-risk software engineering project of your career.

2 out of 3 RPA pilot programs fail. For those that do launch, realizing ROI often takes longer than 12 months. Enter Robots-as-a-Service (RaaS): the vendor assumes the risk and the client doesn't pay for robots, only for guaranteed outcomes. A staffing solution with a single point of accountability.

In this session, attendees will learn how organizations with deep process automation expertise are using the as-a-Service model to decrease costs, improve quality, and eliminate risks typically involved with implementing a successful RPA program.

In this kick off session, our speaker will discuss:

- Where RPA and intelligent automation is now and where will it be in the next 2 – 10 years with respect to the workforce in the immediate and distant future
- How to prepare for the future workforce landscape on a technical, operational, HR, customer delivery, and change management level

David Marckel, Vice President, Information Systems - Technology Shared Services, **BlueCross BlueShield of Tennessee**
Sean Sperling, Director, Claims Administration, **Priority Health**
Moderator: Sal Novin, Business Unit Head HPA, **A Cognizant Company**

9:40am

PANEL DISCUSSION: HOW TO EVALUATE WHICH INTELLIGENT AUTOMATION BUSINESS MODELS MIGHT BE BEST FOR YOUR ORGANIZATION

When deciding which intelligent automation tools and business models would add the most value to your operations, "one size fits all" simply doesn't work. Based on your organization's size, outsourcing and shared services model, departments' project & process needs, and more, one model or a combination of several might be best for your specific business units. But how do you choose?

In this session, our speakers will discuss:

- Various RPA, smart flows, decision services and intelligent automation models and the pros & cons of each, such as: off-the-shelf RPA software, in-house developed/managed or outsourced bots, and intelligent automation implementation services
- How to determine your opportunities and leverage them to achieve process optimization
- Upfront and maintenance costs, potential cost savings, and the logistics related to integrating intelligent automation into your various back office departments or call center operations

Jason Barkham, Vice President, Business Transformation Solutions, **WARNER BROS. ENTERTAINMENT INC.**
Kelly Switt, Senior Vice President, Process Optimization Director, **Citi**

10:20am **MORNING NETWORKING BREAK & DEMO DRIVE PART 1**

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11:20am

INTERACTIVE DISCUSSION GROUPS

During this part of the conference, delegates will be sorted into groups of 20 to take part in Interactive Discussions Groups (IDGs) around the below topics. Upon registering, attendees will choose their top two topics and will rotate between their choices in 30 minute intervals.

* Choose from two (2) of the below IDGs when registering for the event.

CROSS-INDUSTRY AND CROSS-FUNCTIONAL BENEFITS OF INTELLIGENT AUTOMATION

- Which industries and functional departments are best suited for intelligent automation and why?, etc.
- What can industries and functions learn from each other in setting up their programs?

Jeff Brown, HR Service & Operations Director, **Mars, Incorporated**

Carlos Aguirre, Global Manager, Business Process Intelligence & Enablement, **General Motors** *(invited)*

DETERMINE WHEN RPA IS INDEED RIGHT FOR YOUR F&A DEPARTMENT

- Discuss the necessary steps to properly evaluate if it's the right time to move forward with RPA and intelligent automation, based upon scope, budget, buy-in, etc.
- Debate the best time line for implementation and how to introduce the technologies to new functional departments

Marios Stavropoulos, Chief Executive Officer, **Softomotive**

ENSURE YOUR BOT DOESN'T GO TERMINATOR ON YOUR ORGANIZATION

- Data & information privacy and controls
- Understand how AI increases traceability of all processing steps, including multiple system log-ins and cut-and-pasting data between systems
- Intelligent automation security governance
- Should a bot have an independent log- in ID or operate as a role assigned to a human team member

BEST PRACTICES WHEN ROLLING OUT A RPA SOLUTION

- Develop a revised program plan for the new pilot projects you have in the works.
- Assess what other factors you should put into account when deciding if a new functional department or business unit should test out a pilot program as well

Russ Gould, Senor Director, Product Marketing, **Kofax, Inc.**

WHEN TO BEG FOR FORGIVENESS RATHER THAN ASK FOR PERMISSION

- How BNY Mellon's innovative & cutting-edge RPA approach produced significant process improvement and customer delivery results
- When and how to put the cart before the horse and get early results to take to your manager
- How to develop a fast & furious (yet sound and discreet) PoC program to easily upload in a reasonable time frame and with a limited budget

Jon Theuerkauf, Managing Director, Head of Performance Excellence, Robotic Process Automation COE Program Head, **BNY Mellon**

DETERMINE THE COST & ROI OF A BOT PILOT PROGRAM

- Costs associated with a variety of pilot program types, from DIY, off-the-shelf, outsourced, etc.
- Metrics to track and analyze for ROI purposes

Brandon Halbert, Director of Strategy & Operations, **Campbell Soup Company**

ENSURE REGULATORY COMPLIANCE & ENHANCE CUSTOMER DELIVERY VIA AI & COGNITIVE TECHNOLOGY SPEECH ANALYSIS AND ANALYTICS

- Speech analysis software tools that enhance customer delivery
- How and what "speech" to track and report on via AI analytics
- How to best utilize the data that comes from the technology

HOW TO RE-BOOT YOUR BOTS' PROGRAM/S AFTER A LESS THAN SUCCESSFUL PROGRAM ROLL OUT

- How to track and determine if your intelligent automation program/s have hit a pass or fail mark
- Post roll out analysis: did we go too big bang, too slow, did we miss the mark with respect to what our teams actually need to enhance their production, did we select the wrong software or "rules" set up, etc.

Margaret Kilian, Director, Global Process Expert, **Record-to-Report, UCB, Inc.**

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12:40pm **NETWORKING LUNCH BREAK & FRIENDLY FUNCTIONAL LUNCH CLIQUES**

	F&A	HR	CALL CENTERS

1:40pm

PANEL DISCUSSION: LOST IN TRANSLATION: WHEN YOUR BOTS CAN'T UNDERSTAND WHAT 2+2 = IN AN EXCEL DOC

As we all already know, a "bot" can only perform transactional processes they've been programmed to perform. That said, there's a wide variety of financial reporting tasks bots can take off your plate. However, from time-to-time, there are some financial figures a "bot" simply can't understand when said information is presented to them in Excel format.

In this session, we will discuss:

- How to identify an Excel-to-bots "lost in translation" situation
- Software that enables increased financial reporting and documentation

INTELLIGENT AUTOMATION TO CREATE EFFICIENT & USER-FRIENDLY EMPLOYEE ONBOARDING/OFFBOARDING

By utilizing RPA technologies to reduce the time required to manually process tasks that relate to employee sourcing, recruiting, onboarding, and offboarding, your employee HR process operations will be enhanced on a productivity, efficiency and accuracy level. Add supplementary layers of cognitive technologies to self-servicing platforms your workforce can utilize, and your customer deliveries will also be improved.

In this session, we will discuss:

- Cognitive technology that creates user-friendly onboarding – and can be linked to other people analytics platforms and systems

CASE STUDY: HOW AN AI POWERED CONVERSATIONAL INTERFACE ALTERED THE RELATIONSHIP WITH THE ROYAL BANK OF CANADA'S CUSTOMERS

The RBC Conversational Customer Care Virtual Assistant was designed to boost automation, minimize advisor-to-advisor transfers, improve customer satisfaction with conversational dialogues, and use voice biometrics for user authentication. Taking a holistic approach for conversational customer care, everything is deployed on a single platform with a single knowledge base, able to work over all available channels, and able to connect to real human agents when necessary to complete the goal of servicing 100% of customer requests on the first interaction.

David Kapauan, Distinguished Architect- Contact Centre Technology, **T&O Royal Bank of Canada**

2:20pm

INTELLIGENT AUTOMATION TO DETECT, ANALYZE & REDUCE FRAUDULENT ACTIVITY

One of the most daunting problems many companies face is how to accurately and efficiently prevent, detect, and reduce fraudulent activity.

Attacks from opportunistic & professional fraud criminals are designed to be very subtle and well hidden, whereas detection is very difficult.

However, there are indeed intelligent automation technologies that can assist with detection, and in turn, can reduce further threat and financial harm to your company.

In this session, we will discuss::

- Intelligent automation strategies and technologies hat will enable you to detect and prevent opportunistic and professional fraud

Todd Dooley, Vice President, Finance, Productivity & Operations, **H&R Block**

PANEL DISCUSSION: HOW TO DETERMINE WHEN RPA AND INTELLIGENT AUTOMATION IS INDEED RIGHT FOR YOUR HR DEPARTMENTS

As part of your intelligent automation journey, you must thoroughly examine and consider a variety of scenarios and criteria to determine if said technologies are indeed right for your HR Department/s based upon your transactional processes optimization list. Upon doing so, you may find that HR Department/s are indeed ready for intelligent automation, but in a manner in which you didn't originally think. Perhaps smaller or larger-scale, or maybe a completely different set of processes or functional department within your organization would be a better route to go?

In this session, our session speakers will:

- Discuss the necessary steps to properly evaluate if it's the right time for your HR department/s to move forward with RPA and intelligent automation, based upon scope, budget, stakeholder and staff buy-in, process transactions' volumes, et cetera

Christina Paulausky, Senior Manager, HR Shared Serves, **Walgreens**

Pat Geary, Chief Marketing Officer, **Blue Prism**

blueprism

PANEL DISCUSSION: MAIL ORDER BOTS: HOW TO FIND YOUR BOT SOUL MATE

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

In this session, we will discuss:

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

Lee Coulter, Senior Vice President, **Ascension** & Chief Executive Officer, **Ascension Shared Services**

Keith Farley, Director, Innovation & Customer Experience, **Aflac** *(invited)*

Raymond L. Kunik Jr., Global Vice President, Head, Digital, **Hertz** *(invited)*

3:00pm AFTERNOON NETWORKING BREAK & DEMO DRIVE PART 2

3:30pm

HOW TO STRUCTURE A RPA & INTELLIGENT AUTOMATION PROGRAM AS A F&A SHARED SERVICES OPERATIONS DEPARTMENT

As part of your intelligent automation journey, you must thoroughly examine and consider a variety of scenarios and criteria to determine if said technologies are indeed right for your F&A Shared Services Department based upon your transactional processes optimization list. Upon doing so, you may find that your F&A Department/s are indeed ready for intelligent automation, but in a manner in which you didn't originally think. Perhaps smaller or larger-scale, or maybe a completely different set of processes or functional department within your organization would be a better route to go?

ENHANCE SELF-SERVICE HR PLATFORMS & WORKFORCE DATA ANALYTICS WITH INTELLIGENT AUTOMATION

As more and more HR Departments are moving toward self-servicing platforms to increase departmental productivity, today's intelligent automation tools are playing a significant role in enabling them to achieve their process optimization goals.

In this session, we will discuss:

- How intelligent automation can be utilized for such HR self-servicing platforms such as: employee onboarding, payroll, benefits, people analytics, workforce planning, and much more
- RPA tools that enhance self-servicing platforms and provide people analytics and other valuable data analytics to drive enhanced business intelligence

PANEL DISCUSSION: ENSURE YOUR COGNITIVE "SPOKESPERSON/S" ARE ENHANCING YOUR CUSTOMER DELIVERY & PROVIDING YOUR ORGANIZATION WITH VALUABLE BUSINESS INTELLIGENCE

We've all been there before. You're on the phone or in an online chat box thinking you're speaking with a human, but then somewhere down the line in the conversation you've realized you're speaking with a bot. In this session, we will:

- Explore the regulatory considerations that must be top-of-mind with respect to your AI and cognitive technologies
- How to develop cognitive and AI systems that provide valuable business intelligence via data analytics

4:10pm

PANEL DISCUSSION: RPA AS A POWERFUL TOOL TO ENHANCE FINANCIAL ACCURACY, TRANSPARENCY & PRODUCTIVITY

The banking and finance industries were some of the first early adopters of RPA. They continue to lead the path with respect to utilizing RPA and intelligent automation as a powerful tool to achieve process optimization. Additionally, RPA and intelligent automation has offered these industries enhanced financial processing accuracy, transparency, and productivity.

In this session, we will explore:

- How the banking and finance industries have utilized RPA and intelligent automation thus far and what's next for their industries with respect to intelligent automation
- How to mimic the RPA successes these industries have experienced

Alok Bothra, Director, Robotic Process Automation & ECM Champion, **Capital One**

CASE STUDY: HOW WALGREENS APPLIED RPA INTO THEIR HR DEPARTMENT

When RPA first hit the business scene, it was primarily perceived as a tool best suited for F&A departmental functions. However, as more companies have dipped their toes into the RPA waters, it has become quite apparent that RPA is powerful tool that can reap great process improvement rewards for a wide variety of business departments, most especially those found under the HR roof.

In this session, hear about:

- How Walgreen's applied RPA into their HR department and would doing the same reap the same results for your HR department/s
- How to transform your HR department into a more self-servicing operation

Curt Burghardt, Senior Director HR Shared Services, **Walgreens**

SCAN HEALTH PLAN'S JOURNEY INTO COGNITIVE & AI CALL CENTER INTEGRATION AND THE VALUABLE BUSINESS INTELLIGENCE OBTAINED BY DOING SO

With today's environment of Big Data, organizations accumulate and store mass amounts of data and records. The ongoing challenge is what is ultimately done with the data.

In this session, hear about:

- The journey to implement using speech analytics and voice of customer technology
- How this helps drive intelligence across the organization while also addressing operational efficiencies and obtaining actionable data

Troy Shaffer, Vice President Call Center Operations, **SCAN Health Plan**

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4:50pm

PANEL DISCUSSION: HOW TO ENSURE EFFECTIVE IT BUY-IN, ENGAGEMENT & COLLABORATION SO TO ENSURE RPA & INTELLIGENT AUTOMATION SUCCESS

As many organizations have learned thus far, getting a RPA and intelligent automation program past the approval gate and implementation stage requires enthusiastic IT buy-in, intimate engagement, and continuous support. Without their support, moving forward with your RPA and intelligent automation plans will be an upward battle from the get-go and throughout implementation.

By attending this session, you will learn how to:

- Form strategic alliances with your IT departments that speak in a language they can appreciate and get on board with – as it relates to your process optimization plans
- Convey their business worth to said programs and how they will indeed remain an integral player in your program's small and big picture roll out and implementation plans

Peter Lowes, Partner & Co-Head of Robotics & Cognitive Automation, **Deloitte Consulting**

Sridhar Rajan, Principal, **Deloitte Consulting LLP**

Deloitte.

5:30pm

PANEL DISCUSSION: POWERFUL PREDICTIVE DATA ANALYTICS THAT AI & COGNITIVE TECHNOLOGIES OFFER TO ENHANCE CORPORATE STRATEGIC BUSINESS INTELLIGENCE

The process of obtaining clear-cut data analytics that can be thoroughly analyzed to guide your organization toward continued process improvement and enhanced customer delivery is top of mind for a variety of executives who work within the corporate strategy, finance, operations, HR, and customer delivery departments of an organization.

That's where RPA, AI, and cognitive technologies come into play. By utilizing these technologies, not only can you optimize your back-office and customer-facing transactional processes, and enhance your customer delivery, but you'll also be able to harness extremely powerful data analytics that will add great value to departments across your organization.

In this session, we will explore:

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

Sreeharsha Upadhyayula, Vice President & General Manager, **Sears Holding Corporation**

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

Andrew Gurbaxani, PMP, PMI-ACP, Vice President of Analytics & Networking, **Benevis**

Amir Issaei, Operations Research & Advanced Analytics, **American Airlines**

6:10pm **CLOSE OF MAIN CONFERENCE DAY ONE**

6:15pm **NETWORKING COCKTAIL PARTY**

7:15pm **POST-COCKTAIL PARTY EVENING SOCIAL ACTIVITY**

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MAIN CONFERENCE: DAY TWO | WEDNESDAY, AUGUST 2, 2017

8:20am — **REGISTRATION FOR MAIN CONFERENCE DAY TWO & NETWORKING BREAKFAST**

9:10am

CHAIRWOMAN'S OPENING REMARKS

Rachael Stormonth, Executive Vice President, **NelsonHall**

9:20am

KEYNOTE SPEAKER ADDRESS: THE ART OF THE POSSIBLE

RPA, a.k.a. Robotics has reached a fever pitch in the business world today. It is becoming more and more difficult to not hear CEOs, COOs and CIOs talk about how they will be using bots in their companies. And, some will even elude to their expectations and aspirations from this technology. But, will it happen? What's going to hold it back? What needs to change?

In this session, Mr. Theuerkauf will address 3 themes he believes are key:

- What are the common technological barriers that must be overcome
- What are the risk controls that must be codified as part of an out –of-the-box purchase
- What are the organizational and people paradigms that need re-setting

Jon Theuerkauf, Managing Director, Head of Performance Excellence, Robotic Process Automation COE Program Head, **BNY Mellon**

10:00am

PANEL DISCUSSION: CHANGE MANAGEMENT INITIATIVES TO ENSURE SUCCESSFUL INTELLIGENT AUTOMATION ROLL OUT AND DELIVERY

Whether your RPA, AI, or cognitive program/s are in a launch or more mature stage, developing and maintaining a concise yet agile approach with respect to your change management initiatives are imperative for its day-to-day and long-term success.

In this session we will explore:

- Lessons learned by establishing multi-departmental partnerships that encourage communication and understanding between departments, staff, and stakeholders
- Pro-active and continuous PR, marketing, and HR messaging to avoid change management miscommunications, mishaps, and/or disasters

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

Curt Burghardt, Senior Director HR Shared Services, **Walgreens**

Paul Bartley, Director, Global Shared Services, **BD**

10:40am — **MORNING NETWORKING BREAK & DEMO DRIVE RAFFLE PRIZE WINNERS ANNOUNCED**

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11:20am

MATURITY CURVE ROUNDTABLES: HOW TO ESTABLISH, ROLL-OUT, MAINTAIN & GROW AN EFFECTIVE RPA AND INTELLIGENT AUTOMATION PROGRAM

In these maturity curve IDGs, you will have the opportunity to learn more about the challenges you may face along your RPA & intelligent automation journey and the possible solutions that will enable you to be successful with your initiatives.

EARLY STAGE

In this session, we will discuss the below topics:
- How to develop an effective RPA & intelligent automation PoC and Business Case
- Vendor solutions' options, sourcing, and contracting
- How to determine which functions would be most ideal for your operations on a RPA, cognitive, and/or AI level
- Next steps to enable you to move forward to your intended implementation stage

IMPLEMENTATION STAGE

In this session, we will discuss the below topics:
- A – Z project management roadmap for effective roll out
- Tracking your program's success and failures (what to track and how to determine success or failure)
- Moving past implementation to expansion mode, are you ready, what criteria must your programs meet before doing so

ESTABLISHED & MATURE STAGE

In this session, we will discuss the below topics:
- How to mirror your past program roll out victories and ensure continued success.
- Are your programs ready for a global footprint or shared service delivery
- Charge-back models that have finance operations success built into their financial framework and service delivery expectations

12:00pm

NETWORKING LUNCH BREAK & FRIENDLY FUNCTIONAL LUNCH CLIQUES

1:00pm

PANEL DISCUSSION: HOW TO DEVELOP BEST IN CLASS INTELLIGENT AUTOMATION CENTERS OF EXCELLENCE (COE) & GOVERNANCE PROGRAMS

Intelligent automation technologies have hit center stage in the business world for many reasons, most notably for their technological ability to deliver increased process optimization, enhanced customer delivery, and powerful data analytics to drive sound business intelligence into an organization's corporate strategies.

However, in order to effectively leverage intelligent automation into an organization, it's important to establish a centralized organization that provides oversight and sets the direction for these technological solutions. Developing a RPA and intelligent automation CoE will ensure consistent application of your technological and operational infrastructures, keep your strategic practices in check, and will also enable a centralized orchestration of development and implementation of said strategies throughout your organization.

By attending this session, you will better understand:
- How to establish a successful roadmap and prioritization process
- Effective CoE and governance process models
- Best in class change management and communication plans

1:40pm

IS YOUR GPO ROBO READY?

This interactive session is designed for people who are considering RPA as part of a BPO solution. After a briefly discussing contracting for BPO and why it is different from other contracting, we will explore how shifting technology paradigms affect the BPO value proposition. This will be a highly practical session with key takeaways that you can use right away. Some of the topics we will cover include:

- "Gotchas" to watch out for in the procurement process
- Strategies for unlocking the value of RPA in existing deals
- Why some strong pricing terms can be a wolf in sheep's clothing
- Avoiding transformation pitfalls that can sink your deal

Edward Hansen, Partner, Morgan, **Lewis & Bockius LLP**

TECH EXCELLENCE THINK TANK & ROUNDTABLE DISCUSSION: HOW TO ENABLE A RPA SOLUTION FROM IDEA TO IMPLEMENTATION TO ENHANCE AUTOMATION PROGRAMS & PROCESS OPTIMIZATION

This session is designed for professionals working within the RPA and intelligent automation space to collaborate on best practices within their area of focus. The speakers will discuss the nuts & bolts of how to create a RPA Circle of Excellence practice, which takes an idea from feasibility to production leveraging best practices – as well as strategies to better enable them and their Tech team to collaborate with their RPA and intelligent automation internal/external clients.

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

- Governance model that help drive success
- Identifying the right processes that are RPA suitable
- Effective levels of engagement model for Tech teams to drive quick and effective execution results
- Top Do's & Don'ts

Alok Bothra, Director, Robotic Process Automation & ECM Champion, **Capital One**

Don Alexander, Senior Director, Commercial Bank, **Capital One**

Dr. Michael Hites, Senior Associate Vice President for Administrative Information Technology Services (AITS) & Chief Information Officer, **University of Illinois System**

2:30pm

CASE STUDY: HOW MICROSOFT & LINKEDIN LEVERAGED RPA TO MAINTAIN DATA INTEGRITY ACROSS MULTIPLE SYSTEMS

As both companies began to migrate to a common royalties platform, data synchronization between multiple up and downstream systems became a major risk. While already utilizing RPA to drive efficiency in transactional processes, they saw an opportunity to leverage the technology as a key control to ensure data integrity across systems. In this session, hear how LinkedIn and Microsoft have deployed bots to automate processes and establish key SOX controls that ensure data accuracy and completeness in the royalties' calculation and payments process.

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

Rohit Amberker, Director, Royalties and Content Operations, **Microsoft**

PANEL DISCUSSION: DO BIG BUDGET OPERATIONS ALWAYS WARRANT ENTERPRISE RPA & INTELLIGENT AUTOMATION PROGRAMS?

Over the past few years a lot of discussion has been centered on enterprise delivery of RPA and intelligent automation, but is big bang always necessary just because you have a big budget and high transaction volumes in the department you wish to optimize on? In some cases, yes; in others, not necessarily.

In this session, we will:

- Dig deep into determining which enterprise RPA and intelligent automation solution providers make the most sense for your organization, based on the budget you have and might be willing to spend, as well as the scope in which you are hoping to address with that budget

3:10pm

AFTERNOON NETWORKING BREAK

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3:30pm

CASE STUDY: BRINGING BOTS ONBOARD: ESTABLISHING A FEDERAL CENTER OF EXCELLENCE (COE) WITHIN A SHARED SERVICES ORGANIZATION

NASA Shared Service Center (NSSC) launched an effort to expand their workforce and enable expanded services without the addition of new personnel or an increased facility footprint. Come learn about NSSC's journey as they navigate contracting, security and other hurdles with introducing innovative technology solutions with the implementation of intelligent automation to NASA and beyond. The session will be an excellent opportunity to discuss not only how the NSSC is preparing to offer bots as a service via its CoE, but how other agencies are driving to implement RPA or intelligent automation programs for their respective federal agency.

Jim Walker, Shared Service Portfolio Manager, **NASA**

WHICH PROGRAM MODEL IS BEST FOR YOUR ORGANIZATION: KISS IT OR A BELLS & WHISTLES PROGRAM?

In this session, we will discuss such topics as:

- Is it necessary to go with a full-throttle bells & whistles program, or would a KISS it program do the trick
- You may have a reasonable budget and transactional process volume demand need for intelligent automation, but can your x departments manage a program roll out at x scale, and which model would be best depending upon your department's operational, workforce, and other capabilities
- How much would the bots you require cost upfront and on a maintenance level

4:10pm

TOP DOS AND DON'TS OF RPA & INTELLIGENT AUTOMATION STRATEGY AND ROLL OUT

In this final yet very important session, we will look back on what we've learned over the past 3-days and discuss and debate the Top Dos and Don'ts of an intelligent automation strategy and roll out.

5:00pm

CLOSE OF MAIN CONFERENCE DAY TWO — SEE YOU IN DECEMBER!

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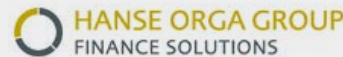
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TEAMS TOP PICKS

MILLENNIUM PARK

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

NAVY PIER

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

SKYDECK CHICAGO

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

360 CHICAGO

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

Who is SSON... And how can we help you?

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 three distinct brands, each offering shared services professionals the information, tools and connections they need to do their jobs

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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:

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- The City Cube compares shared services locations around the world across a variety of metrics
- The Shared Services Atlas locates shared services hotspots around the world from a global database of 7000+ centres

www.sson-analytics.com

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Shared Intelligence is a private online community for shared services practitioners to facilitate networking and peer-to-peer resource sharing and learning.

Members benefit from a range of resources including practitioner-led web casts, event presentations from all SSON events around the world, member-to-member messaging, and more.

Membership of Shared Intelligence is completely free for all practitioner attendees of SSON events. Simply attend an SSON event as a shared services practitioner and you will automatically qualify for a 1 year license for Shared Intelligence.

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